



ERA Chapter Program Planning Checklist

*or ... How to Consistently HONOR Your Members and Guests by
Offering Them Valuable, Well-Run and Welcoming Events*

CHOOSE THE TOPIC, CONTENT AND AUDIENCE.

(Ideally, the selection of a chapter program topic should evolve from regularly scheduled planning sessions.)

- Select a topic and content that are of value to all member firms. (Certain topics are often selected that are more narrowly targeted, i.e., to members in specific industry segments or with special interests. But chapters are urged to offer the majority of their programming on subjects of benefit to all members.)
- Identify the desired outcomes. (As a result of this program, attendees will be able to _____) If specific outcomes cannot be identified, select another topic.
- Identify the audience, e.g., rep firm owners/presidents/managers, all sales personnel (which could include distributors) or all rep firm personnel. Include prospective members, reps in other industries and other guests, if appropriate.

SET THE BUDGET AND FEE

- Establish the budget available to sponsor the program, including the costs for meeting space, speaker(s), food and beverage service, audio-visual equipment, etc.
- Set the per person fee (if any) to be charged. Determine if member and non-member attendees will pay different fees. For costly events, consider using a sliding scale of fees so multiple attendees from the same firm pay less per person.

CHOOSE THE FORMAT AND PRESENTERS

- Designate the format that best fits the topic, content and outcomes (e.g., one or more speakers, panel presentation, roundtable discussion).
- Identify the desired speaker(s), panelists/moderators and/or discussion leaders, as needed and as allowed by the budget.
- Make arrangements with the program presenter(s). Be specific about the content to be covered and outcomes to be realized. Ask what audio-visual equipment, if any, the presenter(s) will need. Also, ask if handout materials will be used and, if so, who will produce them.

CHOOSE THE DATE AND TIME

- Select the program date (ideally at least two months in advance) with input from the presenter[s]. Check calendars to avoid conflicts with other industry events.
- Choose the time of day that your members prefer and/or that seems to best fit the program content and format (e.g., a luncheon is suitable for a presentation followed by roundtable discussions).
- Respect your attendees' tight time schedules. Set (and stick to) a specific starting and ending time. Attendees will appreciate being able to schedule the balance of their business day around the program.

CHOOSE THE LOCATION AND SPECIFY THE SET-UP | ARRANGEMENTS

- Choose a program site that is conveniently located for the majority of your designated audience.
- Be sure the site has comfortable, attractive space for your function, offers adequate parking and can provide any required food and beverage service.
- Work with the site staff to specify room set-up. Schoolroom/classroom (rows of narrow tables with people seated facing front), conference style or U (attendees seated around open box or horseshoe) or banquet rounds (set as crescents, open to the front so attendees do not have their backs toward the front of the room) are almost always preferred over theater style (rows of chairs only). Be sure to request a registration table just inside or outside the entry and additional tables for any display materials. Consider whether any of these options are needed: a coat rack; a work table and podium for the presenter(s); risers to create a low stage (for a large room); or stools for panelists (do NOT seat panelists behind a table).
- Choose the food and beverage service and designate the specific service time. At the minimum, be sure that water pitchers and glasses are on all tables.
- Order (or borrow) any required audio-visual equipment.
- Before signing a contract with the site, if one is required, be sure it clearly states the program date, time, room set-up, deadline date for providing an attendance guarantee, food and beverage menu, audio-visual equipment to be rented and all related costs, including the method of payment, cancellation deadline and cancellation fee.

COMMUNICATE, COMMUNICATE, COMMUNICATE

- Once the program is arranged, announce the details to your members (and if appropriate, prospective members, reps in other industries, distributors and other potential guests) a minimum of one month in advance. Use mail, e-mail, and the chapter Web site to promote the event. Also consider issuing press releases to local industry publications and/or the business sections of local newspapers.
- Be sure your notices/flyers are concise and easy to read. Use large type and graphics to highlight the date, time, site, topic, speaker(s) and benefits (i.e., as a result of this program, attendees will be able to). If needed, include driving directions to the site and a map.
- Specify a reservation deadline that falls just before your contract deadline for providing a guaranteed attendance figure.
- Include a response form that requests all necessary information about attendees. Ask registrants to print so their names are easily readable. Be sure to request fax numbers and/or e-mail addresses so any follow-up or last-minute communications can be easily transmitted.
- Put a contact name and phone, fax and e-mail numbers on all notices so recipients know whom to contact with questions.
- Send repeated notices (minimum of three) one to two weeks apart, and use different methods (e.g., fax, followed by e-mail) to be sure at least one or two are read. The notices can be primarily the same but should incorporate, at minimum a new headline/greeting.
- To maximize attendance, use a calling tree (board members or other volunteers) and/or invite prospective members as special guests. Depending on the topic and content, also consider inviting regional managers, distributors, customers and reps in other industries as guests.
- When appropriate, use the names of early registrants for the program to promote attendance (e.g., these distributors have already signed up for the forum ... guests from these manufacturers will be attending, etc.)

ESTABLISH A WELCOMING ENVIRONMENT

- Arrive early to check the room set-up and arrange registration and display areas. Be sure your event and the room location are listed on the facility's directory (if one is available). Check the facility's signage to be sure attendees can find the room easily. (Tip: Make or acquire a reusable "Welcome" sign to be placed on an easel at the entry to all of your events. Use a brightly-colored laminated poster board that members will learn to look for.)
- Assign officers/board members as greeters. Be sure everyone is welcomed, introduced to others and engaged in conversation.
- Have name tags or badges ready at the door for all who have made reservations. (Use ERA's free Member and Guest name tags). Don't forget to bring blanks that can be filled in at the door for walk-ins. (Consider having the greeters actually put the tags or badges on each attendee - experiencing "the touch.")
- Create an attractive, inviting display of ERA information materials for attendees to browse through and take with them (e.g., chapter newsletters, upcoming event flyers, national publications, member service and MRERF brochures, etc.) This type of display should be part of every chapter program.

CONDUCT THE EVENT ... DON'T JUST LET IT HAPPEN

- In advance, assign an officer or other member as M.C. (not necessarily the president). He or she should be a capable public speaker who is at ease in front of an audience. If others will be making announcements or introductions, the M. C. should be sure they are prepared and can be brief.
- Start the program on time (or within ten minutes if still waiting for a significant number of attendees).
- Follow a pre-planned sequence for the overall event so minimal time is taken away from the actual program. Welcoming remarks, introductions of guests, officers, etc., and important announcements should take no more than a few minutes. (Remember ... this is a program ... NOT a chapter business meeting.)
- When introducing program speakers/panelists, etc., do not assume "everybody knows" them. Use biography sketches or other information from the presenter(s) to prepare the introductions in advance.
- At the conclusion of the program, the M. C. should express the chapter's gratitude and, if appropriate, present an appreciation gift. Tip: It's far better to overdo or "make a fuss" rather than hastily dismiss the presenter(s).
- Ask attendees to complete and turn in evaluation forms (if being used).
- Close the event by making final reminder announcements, thanking the attendees for participating and asking them to return.
- Station one or more greeters at the door to personally thank everyone for attending.

EVALUATE YOUR EFFORTS

- Use attendees' evaluations, presenters' input and board members' assessments to improve future events.
- Enjoy your success ... and ...

BEGIN AGAIN!