



CERTIFIED EVENT MANAGEMENT EXPERT

## **CERTIFIED EVENT MANAGEMENT EXPERT (CEME)**

### **STUDY GUIDE**

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This study guide has been created for individuals who are studying for the Certified Event Management Expert (CEME) Certification Program. Please use this guide to assist in preparation for your examination; it details the exam structure and categorizes the study material within each content area.

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## **I. BUSINESS TRAINING:**

**BusinessTraining.com** is the leading online program for specialized niche business certification programs. The team behind BusinessTraining.com is comprised of industry experts in niches including online marketing, project management, public relations, consulting, and many more.

This experience, combined with our advisory board's expertise in online education and training, is what makes it possible to provide the training and certification programs found on our website.

BusinessTraining.com is part of the G.T.C. Institute, a global training and certification organization that has provided practical industry-specific certification to over 15,000 clients from the United States, Europe, and more than 30 other countries around the world.

We provide high value training programs that provide function knowledge on very specific business topics such as public relations, online marketing, project management, international business, and consulting.

**BusinessTraining.com's Mission:** To provide professionals with high impact business training and certifications in niche subject areas that are functional and immediately beneficial.

**BusinessTraining.com** helps you to:

- Quickly gain specialized knowledge in highly valuable business niches.
- Enhance your credibility, resume, and overall value in the marketplace.
- Complete our training programs in 5 months from anywhere in the world.

Our programs accept participants year-round and are flexible to work with your current work schedule and academic constraints. You can complete one of our programs in 2 months or 2 years; the choice is yours.

## **II. CEME DETAILS AND TIMELINE:**

### **PROGRAM DETAILS:**

The **Certified Event Management Expert (CEME)** certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a more cost-effective program. The CEME Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world.

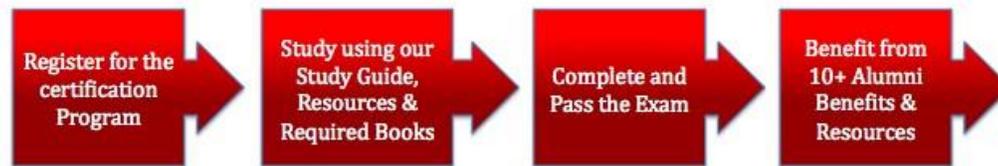
The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

Our goal is to offer the most challenging program in the industry while also providing all of the learning tools possible to ensure participants get the most out of the experience. By testing the knowledge depth and comprehension from the materials digested, the CEME certification prepares individuals for successful, real-world application.

The Certified Event Management Expert (CEME) program is sponsored by the GTC Institute and offered by BusinessTraining.com. This certification program is designed to show and certify that you have gained an in-depth understanding and high-level, specialized knowledge.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and networking, our organization is also developing additional resources for CEME Participants. This includes video and MP3 recordings on Q&A or strategies and tactics, webinars, access to interviews with internet marketing professionals who have more than 10 years of experience in the industry, among many more benefits.

#### 4 STEP CERTIFICATION PROCESS



#### TIMELINE & EXAMINATION DATES:

Programs are offered through open enrollment, making our programs 100% flexible with your current work or academic schedule. After joining you may select an examination date that works well for you. Our exam days are on the 1<sup>st</sup> Wednesday of each new month.

BusinessTraining.com exams are administered 100% online. **Please note that your exam date request must be received at least 3 weeks before the exam date.**

#### To register for an examination date:

- 1.) Email your desired exam date to [Support@businesstraining.com](mailto:Support@businesstraining.com).

#### BENEFITS OF THE CEME PROGRAM:

- Learn about the five critical skills of event management: research, design, planning, coordination and evaluation
- How to manage time, staff and volunteers effectively
- The best ways to identify a venue and how to conduct a site inspection before booking location(s)
- What you need to know to hire and manage the best vendors, caterers, audio/video/lighting technicians and entertainment
- All about the importance of risk-management and how to implement essential procedures and tactics
- Everything you need to know about contracts, permits, licenses, and insurance and negotiating them thoroughly and accurately
- Why your budget impacts every facet of an event and how to manage it skillfully
- The principles of event design, decoration and working with decorators, florists and special effects suppliers

- Food and beverage for any type of event and how to maximize the quality and value received from caterers, bartenders and restaurateurs
- Developing quality strategic alliances with sponsors, suppliers, destination management services, and even customs officials overseas
- How to perform on-site logistics seamlessly, from registration to transportation, supplying internet access to signage, setting up your on-site office to writing your final report and thank-you notes.
- The how-to of incentivizing meetings and events, and incorporating awards, recognition, gifts and giveaways

Equally as important, CEME certification from the G.T.C. Institute shows your clients you are a specially trained professional in the event planning industry, and that you stay on top of your game and ahead of your competition.

The CEME certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a more cost-effective program. The CEME Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world. The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam. Our goal is to offer the most challenging program in the industry while also providing all of the learning tools possible to ensure participants get the most out of the experience.

#### **LEARNING OBJECTIVES OF THE CEME PROGRAM:**

The G.T.C. Institute Certified Event Management Expert (CEME) training and certification course learning objectives include:

- How to quickly and effectively improve your practical event and meeting planning and management through best practices in conceptualization and budgeting, to attendee acquisition and marketing.
- Why successful events require attention to every detail including budget, timelines, choosing the best current technologies, securing insurance and permits, creating impactful atmosphere at venues and managing staff.
- How to effectively negotiate agreements and contracts for venues, caterers, audio-visual suppliers, decorators and all other companies that provide services to the event industry.
- How to leverage your interest in the event, meeting, hospitality, tourism, sports and travel industries into an exciting and lucrative event planning career.
- How to instinctively create the look and feel of events based on their type and objectives whether they are social functions, community events, corporate meetings and conferences, or sports and travel expositions.
- What's going on now and what the future will look like for the meeting, seminar, conference, convention, exposition, trade and consumer show, and special events industries.

- How online technologies change the way people convene and hold meetings.
- What impact “greening” events has on both the environment and your clients, and how to maximize green planning effectively and profitably.
- Why being an effective researcher and wealth of knowledge about the vast world of event planning resources will make you competitive in the industry.
- What qualities you need to be an effective and in-demand event planner and how to sell your services.

### III. Required Readings

Information from the following books will comprise the exam questions.

1. *The Complete Guide to Successful Event Planning* by Shannon Kilkenny. ISBN-10:0910627924
2. *Event Planning: The Ultimate Guide To Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, Incentives & Other Special Events* by Judy Allen. ISBN-10:0470155744
3. *Simple Steps to Green Meetings and Events* by Amy Spatrisano and Nancy Wilson. ISBN-10:0615169902

You can review and purchase all three of these books at Amazon.com.

### IV. Book Summaries:

#### Required Reading #1: *The Complete Guide to Successful Event Planning* by Shannon Kilkenny

The Complete Guide is a valuable resource for any person (seasoned or not) who plans and manages events. Kilkenny describes event planning as “bringing people together for a specific reason,” and thus considers it to be the “oldest profession.” Kilkenny has been an event director for three decades and began her career before it was a recognized avocation.

#### The Anatomy of an Event—Types and elements of events, why they occur and who attends them.

- A. Special and social events: These include everything from sporting events to weddings and anniversaries, and trade shows to receptions and fundraisers.
- B. Business and educational events: Workshops, seminars, retreats, conventions and sales meetings are included in this category.
- C. Reason for an event —Why people meet: To celebrate, improve skills, network and even “just because.”
- D. Location options: From warehouses to wineries, colleges to cruise ships, airport hangars to art galleries, and everything in between.
- E. The fundamental elements of events: A list of essentials to every successful event including goals, budget, timeline, venue, food and beverage, and more.
- F. Tasks of an event planner: Do everything necessary to plan the event and perform on-site management.

## The Big Picture

Designing the vision: Create a “defined vision” that includes everything from marketing goals and materials to acquiring outside consultants and creating committees.

- A. Goals and objectives: Establishing the purpose of the event and its measurable/attainable target is step one.
- B. Setting financial goals: The importance of a budget financial success and recognizing the return on investment (ROI) is not just monetary and includes overall success, recognition and building towards a repeat event.
- C. Identify your participants: Identifying the people who want and will attend your event is critical to its success.

The planning sessions: All players should attend planning sessions to map out every event detail. Designing the sessions helps the planner determine the five “Ws” of planning meetings.

- A. Goal questions: These include space requirements, budget parameters, sponsorship needs, venue and off-site requirements, etc.
- B. Time frame for meeting: Make sure you have ample time scheduled.
- C. Roles and responsibilities: Choose your players early and delegate to them early in the planning phase.
- D. Creating timelines and checklists: Both are critical; one keeps the planner on schedule, the other prevents details from slipping through the cracks.
- E. Outsourcing: If you need an expert for an event element, hire one.

## Where is the Money?

Creating a budget: Create a solid budget and determine who has the authority to spend.

- A. Revenue and income: Types of revenue include registration fees, sponsorship, sales of books and t-shirts, etc.
- B. Sponsorship: Both cash and in-kind sponsors add revenue and value to an event.
- C. Expenses: These include fixed costs, variable costs and indirect costs; budget goal should be to be profitable or at least break even.
- D. Accounting styles: cash accounting is easier than accrual accounting which is more accurate.

## Greening Your Event

- A. What is green planning? Conserving energy, minimizing resource consumption and waste, mitigating negative impact on the environment.
- B. Think locally: Using local products for everything possible to reduce shipping and transportation waste and pollutants.
- C. Is a meeting necessary? Don't have one if it isn't.
- D. Setting your environmental standards: assess the following based on green objectives— destination, accommodation, venue, transportation, food and beverage, communications and marketing, exhibition production in 10 easy steps.
- E. Travel ideas: use environmental organization and association resources to reduce event's carbon footprint.

- F. Event awards and certification: use a green events award system to model your event and compete for cash awards.
- G. Beyond recycling: require recycling and make it easy.
- H. Green venues: use venues that have a green aesthetic and policies.

### High Level Logistics

- A. Choosing the right dates: Research to make sure other area events don't conflict with yours, consider weather/season, schedule off peak to save money.
- B. Choosing a destination: Will participants have to travel or are they local and how does that impact destination choice?
- C. Choosing a sight: Use convention and visitors bureaus, and ask potential venues to submit a detailed proposal per your RFP specifications.
- D. The site inspection: Do a physical inspection when possible and check out the neighborhood; also schedule a pre-event meeting with venue representatives.
- E. The ADA: Planners are responsible for ensuring that event facilities comply with ADA laws.
- F. Outdoor sites: Site inspections for outdoor sites are critical because it is more complicated to hold events outside than in.
- G. Choosing speakers/entertainers: The right speakers/entertainers can make or break an event; get references and make sure you budget for quality.
- H. Signing a contract: Booking speakers and entertainers should always include a signed contract.
- I. Creating your agenda: There should be separate agendas for attendees and staff/vendors.

### Creating the Atmosphere

- A. Room set-up: Determine what setup style best fits each segment's purpose—classroom, hollow square, theater, etc.
- B. Registration/ticket area: Needs to be readily accessible to all and well organized.
- C. Audio/visual requirements: See "Staying on Top of Technology" chapter as a/v technology is very advanced.
- D. On-site internet: Internet access is essential to modern-day events and planners may want to charge for its use.
- E. Material and promotional gifts: These are always popular and an earmark of a good event.

### Food and Beverage

- A. Know your audience: Food choices need to answer to special needs, match the style/flavor of the event and take age, gender and other societal issues into account.
- B. Guaranteeing your numbers: Scheduling, weather and other variables can affect your final numbers.
- C. Working with the venue and caterer: Rely on your caterer's knowledge and work closely with them to make the best choices.
- D. Cost-cutting suggestions: Best practices for proper scheduling and maintaining a low budget generally and specifically as it relates to receptions, cocktail parties, wine with dinner, coffee breaks, and breakfasts.
- E. Alcohol liability: Adhere strictly to a 13-point list of alcohol liability reducing best practices.

## Marketing Your Event

- A. Promoting your event: Publicity is imperative to an event's success, and is not about quantity but clarity and target of messaging.
- B. The invitation and marketing material: There are many types of material, all should command attention, interest, desire, action and have great copy; as well as comprehensive event details.
- C. Designing your web page: Make sure the site allows for online registration.
- D. Reaching your target market: Know the demographics of your market and don't waste time and money reaching outside it.
- E. Networking for leads: Use local and applicable associations (i.e. chambers of commerce) and your personal network.
- F. Timing: Start promoting the event as far in advance as possible.
- G. Promoting a global event: Be aware of differences in cultures, languages, symbols, gestures, etc., and market specific to the culture of target market.

## Staying on Top of Technology

- A. Know what you need: Research what's available and know what your speakers need.
- B. Terminology: List of technology terms in the a/v world.
- C. Internet access: Is a must at today's events; know your bandwidth needs and budget for implementing internet access.
- D. Podcasting: Consider using podcasting technology (high quality audio of presentations) to include people who couldn't attend the event.
- E. Using Kiosks: Both low- and high-tech kiosks are available for most events and make good information centers.
- F. Networking with technology: RFID identifies event attendees to each other via handheld wireless device, eliminating name tags.
- G. The new breed of audio-visual services and equipment: There are many equipment types and services available to meeting planners including presentation management, web casting, and visual rendering of meeting space and layout for planning purposes.

## Contracts and Insurance

- A. About contracts: Contracts should be detailed and in writing.
- B. Getting a contract: A contract begins when it is signed by both parties.
- C. Amending a contract: Amendments should not be handwritten and must be signed by both parties to be enforceable.
- D. Expect the unexpected: Contracts should anticipate even unexpected challenges and needs.
- E. Acts of God and force majeure: Contracts should provide out clauses for unpreventable and uncontrollable circumstances.
- F. Venues, audio-visual, food, beverage and more: Preview all venue and service provider typical contracts before selecting and beginning contract proceedings.
- G. Signing foreign contracts: Agree on a language for the contracts and use a translator with legal knowledge if necessary.
- H. Insurance: There are a number of insurance types required for events; make sure you have coverage for any and all required.

### Security Issues

- A. Protecting your high-profile guests: If your celebrities do not have their own security you should provide it for them.
- B. Crowd control security: Large crowds require it.
- C. Data security: The SOX act requires planners to keep personal data secure.
- D. Registration data: All is required to be protected and kept confidential.
- E. What is your privacy policy? It must be disclosed to participants prior to registration.
- F. Network protection: Part of required security is a protected network.

### On-site Logistics–Logistically Speaking

- A. Finalizing the details: Includes registration, speaker and entertainment confirmation, pre-event meeting with all players, finalizing details with venue, vendors, and getting all necessary paperwork in order, scheduling, packing, etc.
- B. Materials for the event: Include program, attendee list, forms, giveaways, etc.
- C. Shipping: Organize well and don't wait until the last minute.
- D. Choosing a customs broker for out-of-country shipping: Make sure they will work on your schedule so your packages don't get stuck in customs.

### The Day Has Arrived

- A. What to do when you arrive: Arrive days early for large events, unpack, set up office, make friends, familiarize yourself with local businesses you may need, etc.
- B. Rehearsal: at least a day in advance make sure your plans will work by rehearsing elements of the event with staff and volunteers.
- C. Registration check-in area: Staff it sufficiently with knowledgeable, helpful people, and use effective signage.
- D. On-site management: Make sure staff is polite, pleasant and knowledgeable, inspect facilities and equipment, and check all first-day charges for accuracy at day's end.
- E. Contingency plan: There will be calamities and crisis, plan for them.

### After the Show

- A. Pay the bills.
- B. Debriefing meeting: Discuss what worked and didn't, goals and vision met?
- C. Thank yous: Be specific and personal.
- D. Follow-up evaluations: These help your presenters improve.
- E. Final report: Should record the event thoroughly.

### Appendices and Resources

- A. Event planning industry: Associations and organizations.
- B. Trade publications
- C. Qualities of an event planner
- D. Negotiation skills and strategies
- E. Ethics
- F. Employers that hire event planners

- G. Resources lists
- H. Sample checklists, reports, planning forms, agreements, and timelines
- I. Author's biography
- J. Glossary

**Required Reading #2: *Event Planning: The Ultimate Guide To Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, Incentives and Other Special Events* by Judy Allen**

**Chapter 1: Initial Planning and Budgeting**

- A. Determining Your Event Objectives: Plan to meet client and attendee expectations; create anticipation, maximum attendance and participation; establish tangible and intangible objectives, create event value for client.
- B. How Much Can You Spend? Set aside adequate funds for the event; assess the short and long term objectives relative to budget; develop a preliminary budget; research means to increase budget.
- C. Event Vision: Set objectives through event visualization; always consider the 5 event design principles; plan to timing, logistics and orchestration; list and plan for the must-haves; determine environment (venue, location, date, season, time of day, atmosphere, overall effect, energy, emotion, etc).
- D. Event Vision Q&A: Understand the types of questions to ask while creating an event vision; create a detailed wish list that includes everything and their costs.
- E. Design Objectives of the Event Experience: Be clear about company and event objectives, incorporate trend towards elevated events designed strategically to enhance attendee quality of life; incorporate the 5 event experience design objectives (educational, enlightening, engaging, energizing, entertaining).
- F. Initial Planning: Event planners offer business sales and marketing tools that help corporate clients, nonprofits, and individuals meet and exceed identified objectives; event-related consultants can help planner save money; create event tailored to the target audience; work your calendar backwards to create a schedule; plan ahead and know when to postpone.
- G. Visualization: Mentally walk you through your event in advance and anticipate potential problems; determine staffing; consider options and how they affect the budget; visualize an event that is a true reflection of the client image.
- H. Monitoring the Budget: Reconcile budget each time you make changes; before you sign a contract make a payment schedule; advise clients of payment terms and conditions at the time of contracting.
- I. Event Design Principles and Checklist.

**Chapter 2: Organization and Timing**

- A. Critical Path: create this official master document of contract timing, logistical information, schedule of events; share it with all individuals involved; number and date each revision; practice organization and attention to detail; enforce strict adherence to calendar that includes

attrition and cancellation dates; get required action dates from suppliers; when mailing information address one piece to yourself.

- B. Function Sheets: These are event scripts and include agenda, staff assignments, contact list, timing, logistical and legal requirements; document all supplier and other agreements.
- C. Timing and Date Selection: Know what seasonal impacts might occur at event time; before finalizing your date research for conflicts like holidays, school breaks, and other events.
- D. Critical Path Checklist and Charting Your Critical Path.

### Chapter 3: Location

- A. Site Selection: Site is of primary importance; you are only limited by your imagination and budget when choosing a venue; venue types (hotel, convention center, restaurant, chic boutique, ballroom, theater, yacht, cruise ship, roller-skating rinks, airport hangers, armory, museum, art gallery, tented parking lot, tennis court, private club, etc.); ask restaurant to let regular customers know about private event; allow for adequate move in and move out times; investigate sun set and climate for outdoor events, have back-up plan and heaters; be familiar with location's safety and security procedures and cancellation clauses; anticipate the financial risks from unexpected occurrence; help winter travelers use southern routes.
- B. Location Requirements: Map out logistics, timing, space, move in, setup rehearsal, tear-down, move out, permitting and security.
- C. Hotels and Convention Centers: Hotels are cost-effective if you need guest rooms; should be no charge for room rentals if facility caters the event; hotel events reduce transportation costs; remember tipping and other costs in budget; have costs agreed to in writing before contracting; convention centers often have labor charges; ask about additional charges before contracting; is labor union or non-union.
- D. Restaurants, Private Venues, Catering: Like with all other venues, make sure you get all costs in writing and put them in your budget and contract.
- E. Theaters: Determine capacity; make sure fire exits are cleared; know the rules and regulations; do a film run-through; pre-plan timing, distribution, traffic control and security.
- F. Tents: Use them to create a main venue or provide additional space or backup space in case of inclement weather; allow 20 sq. ft. of floor per person; pole tents have high, peaked ceilings vs. framed tents which have a higher installation costs but provide more structure; verify tent quality; do site inspection with vendors; know permitting and insurance requirements; plan setup and installation timing; provide one bathroom for every 75 guests; budget extra security for tent

overnight and include costs for flooring, lighting, generators, air-conditioning, heaters, ceiling fans, etc.; catering tent, smoking area, and any other requirements.

- G. Gala Openings in New Venues: Make provisions for risk-assessment insurance in case the building does not open on time.
- H. Contracts: Always have copies of all permits and contracts with you on-site and make sure to go over them with all necessary parties prior to event.
- I. Location Q&A: Includes exclusive access time in contract; put time for set-up in contract; ensure rooms will be cleaned and available when you need them; provide for moving out unneeded furniture or fixtures; have proper insurance; know room capacity and adhere to it;

know zoning, venue, fire safety and noise restrictions; enhance setting with décor if necessary; make sure kitchen, bathroom facilities and accoutrements are sufficient.

- J. Checklists: Move-in requirements, event suppliers' setup logistics, event suppliers' teardown.

#### Chapter 4: Transportation

- A. By Air or Land: Remember that the event experience starts when participants leave home; make the experience pleasant, fun and stress-free; have proper insurance and waivers for less conventional transportation which should fit the occasion, theme and client; have a back-up/emergency plan.
- B. Transportation Q&A: know transportation provider protocol; secure proper space, parking and permits; have transportation at pick-up areas 15-30 minutes in advance; keep driver's info with you; research and inspect companies; know total number of people to transport and schedule for same; for self-drive events focus on parking accessibility and availability; use traffic control when needed.
- C. Transportation Checklist: assess event transportation requirements, conventional and creative possibilities; determine number of vehicles required per transfer; transfers are part of the event experience, comfortable, convenient and stress-free; choose appropriate routes; know and budget for all costs; decide how group departure and drop-off can be made convenient.

#### Chapter 5: Guest Arrival

- A. Guest Arrival: Can be sensational fanfare to special meet-and-greet, all with touches showing care and attention to detail and setting the mood; create energy at arrival and build anticipation; visualize your guests first impression as they arrive; make transfers and hotel check-in more easy.
- B. Coat Check: keep traffic flow patterns in mind when laying out the room, know capacity, types of hangers, staffing requirements, staffing breaks, security and gratuity, find out who is responsible in case of emergency; know cell phone restrictions.
- C. Fanfare: have key suppliers meet at the site at the same time for a site inspection, so everyone will operate as a team; find out from each supplier how much setup time they will require; know what's going on just before they setup; "Wow" possibilities: dancing waters, bubblewalls, waterwalls, waterfalls, Le Flame, walkway of pillars of flames; union vs. nonunion: know venue regulations, restrictions, and electrical needs in advance.
- D. Registration: Guest pass security and ticket pickup; staff should be easily identifiable; work from a blueprint or room layout chart; ensure good condition of table and chairs and max number available; obtain linens, draping, skirting, signage (know signage restrictions); secure adequate extension cords; test communication and a/v equipment.
- E. Guest Arrival Checklist: Assess all guest arrival transportation and parking requirements; decide if there are any weather backup or other legal considerations (i.e. tenting of entranceway, permits, crowd control, off-duty police to direct traffic, umbrellas, wheelchair accessible, etc.); determine how many entrances will be needed; design an arrival that is welcoming and sets the tone; find out what will be required by suppliers and if there are additional costs.

## Chapter 6: Venue Requirements

- A. Room Requirements: Consider all factors/requirements when selecting the rooms; what is on the floors, walls, ceiling, back entrance; width of doors and ceiling height; sight lines, airwalls, soundproofing and room acoustics; room capacity and fire regulations; venue's terms, conditions and insurance requirements; suppliers' room requirements on the day of the event and on move in, setup, rehearsals; teardown and move out days.
- B. Type of Event Space Required: cocktail Reception 8 square feet per person, cocktails with food stations 12-15 square feet per person, seated dinner 20 square feet per person; dance Floor 3 square feet per person and 20 square feet per instrument for band; minimum ceiling height for rear-screen projection is 22 feet.
- C. Venues and Event Supplier Checklist: Room, venue and supplier requirements, and contract; terms and conditions; legal capacity; electrical requirements, capabilities and charges; fire marshal ruling to be aware of and required permits to be obtained; supplier required access times for move in, setup, rehearsals, day of, teardown and move out and charges; venue and room access times; potential timing and logistical conflicts; supplier timelines and commitments pre and post event; written quote, laid out in menu format, with all applicable taxes, service charges and tipping; Sample contract review: sample payment schedule to review, attrition dates, number of guarantee dates, cancellation charges, terms and conditions, policies and procedures, general information/general catering information; pay attention to the fine print and never sign a contract until the changes you have requested have been made.

## Chapter 7: Who's It All For?

- A. Know Your Guest Demographics: Fully understand exactly who will be in the room or attending the event; tailor your event inclusions and event style to meet their needs, tastes and event expectations.
- B. The Guest List: State whether or not invitation is transferable; make decision of who to invite based on the objectives of the proposed event; know how many guests can be accommodated and fit within budget; allow a minimum of 8 weeks to prepare the guest list; pay attention to timing of invitations for mailing and RSVP date.
- C. Invitations: Save-the-date should include date and time; print invitation quote requirements and timing; know what needs to be included in invitation (10 items); be able to create customized invitation timeline per event.
- D. Media: Make sure the media personnel's needs are met; include them as guests and in the budget; offer them a seat, food and beverage; assign staff to work with media exclusively; accommodate their photo shoot list by prearranging the time and setting; be prepared to provide a press kit.
- E. Children at Your Event: Receive written permission if children are taking part in activities; know if there are any medical problems (food allergies) and have professional staff on hand to provide care and security; make sure to have emergency contact information; avoid name tags in public areas.
- F. Event Websites: Recommended; make sure they match the theme and look professional.

## Chapter 8: Food and Beverage

- A. Examples of Texas Theme Party: Food is part of the mood, experience and décor; diamond and denim with bling, wanted posters and barbecue; black tie and boots ball with tuxedos, ball gowns and all western boots and décor.
- B. Food and beverage Considerations: Caterers and venues can create menus to budget; give consideration to food that won't drip, vegetarian and other special food requirements; head count; always have enough beverage and bartenders; be amply prepared for taxes and tips; coordinate closely with staff.
- C. Menu Planning: Budget driven; no room rental for large crowds that will be eating; Considerations include being prepared for early arrivals, season, how culinary-adventuresome attendees are; presentation; breakfast should vary from day to day, offer a healthy variety, provide light breakfast before heavy lunch and vice versa, guests may prefer to eat in room from menu; coffee breaks should be provided either served or buffet-style; Lunch options can be cooked or boxed; Cocktail parties should happen before a scheduled party and be no longer than two-and-a-half hours, have a specialty drink to serve as an icebreaker, keep background music low enough to encourage conversation, indoor, outdoor and

poolside options should be considered, be mindful of the weather for guest comfort, keep hors d'oeuvres bite-size and non-messy, have servers or food stations, only 6-8 appetizers per person if dinner follows, 18-30 if not; dinner options are endless, if no cocktail reception provide space and opportunity for mingling, budget and objective driven, sit-down dinners with assigned seating require seating plan, don't crowd layout of tables or seating arrangement, visualize the entire room while planning, restaurant groups may eat off the menu or from a special menu, know what utensils are required for dinner type and size, budget carefully for wine, champagne or bar service.

- D. Staffing: Work closely with staff on everything from dress to schedule and protocol; make sure there are greeters and information resources for guests.
- E. Charitable Donations: Provide for donation of unused food to charity.

## Chapter 9: Other Considerations

- A. Entertainment: Know your audience likes and dislikes; consider something unique to the locale; look for new and fun options; schedule carefully to keep attendees entertained and moving at all times; know and rehearse schedule, extended hours of performance if required, equipment loading needs, dressing room requirements, alcohol protocols for performers, blacklisted song selections, insurance and permits.
- B. Photographers and Videographers: Know their style, how many you need, what their reputation is, your needs for guests, record keeping and the media, how long you need them, what format you want results delivered in, pay scale and method, turnaround time, make sure they know who the VIPs are.
- C. Theme and programs: Centerpieces can be made of practically anything for any budget; make sure your décor works with the room elements you cannot change, much of the décor can be rented; special effects might include trees, fake snow, confetti showers and balloon drops; specialty acts like circus performers or fashion shows might be appropriate; parting gifts are always welcome and should be memorable.
- D. Final Touches: These might include lighting tricks, interactive activities, gifts in rooms, etc.

- E. Staff, Supplier and Entertainment Work Permits: Especially for international events, make sure anyone who will be paid for services has appropriate permitting in place.
- F. Event Risk Assessment: Risk assessment should be part of your planning and execution and includes issues like liability, bad attendance, weather issues, power or sewer failures, inability to secure special permits, and much more; event planners need to anticipate all potential risks and have a plan for management of them.

### Conclusion

- A. It's a Wrap! Evaluate every element of the event and create a post-event summary report.
- B. Applause! Applause! Make sure you thank everyone from staff and guests, to speakers and entertainers and service and goods providers.
- C. Your Next Event: Learn from each event to improve the next one.

### Appendices: Sample Cost Sheets, Sample payment Schedules, Sample Function Sheets

### Index

## **Required Reading #2: *Simple Steps to Green Meetings and Events* by Amy Spatrisano and Nancy Wilson**

### Chapter 1 – Overview

- A. Events rely on many energy-consumptive and waste producing industries: energy, transportation, food, community services and accommodations.
- B. Consumption and waste at events is massive.
- C. Green meetings and events are those that incorporate planning for reduced consumption, pollution and waste at every level of the event.
- D. Environmentally friendly events are not cost-prohibitive, do not need to be 100% green, don't take much more effort than other events and are appreciated by everyone.
- E. Green planners are in ever-higher demand and many countries do and will require events to be green.

### Chapter 2 – Getting Started

- A. When planning a green event, determine how much the client wants in the green realm, how much they will contribute towards the effort, and how visible they want the greening to be.
- B. Develop a minimum green guideline for destination, accommodation, venue, transportation, food and beverage, communications and marketing, and office procedures.
- C. Communicate your green objectives thoroughly to all players.
- D. Be prepared to educate while negotiating green contracts.
- E. Track your efforts and measure the results; share these with attendees and client.
- F. There are a lot of companies and organizations that know how to green events; use them as resources.

### Chapter 3 – Destination Selection

- A. Choose destinations that require minimal travel but suit the event’s purpose, get a list of environmentally responsible area organizations and facilities, include your green criteria in RFPs and contracts, evaluate all aspects of the area and venue based on your green criteria.
- B. Minimum green guidelines should be established in the areas of air quality, energy efficiency, water conservation, waste minimization, environmental purchases.
- C. These guidelines need to be applied to the venue, accommodations, restaurants and caterers, and all other service and goods providers.

### Chapter 4 – Accommodations Selection

- A. Pick accommodations that have a linens and towels reuse program in place, have in-room energy saving policies and procedures, dispense amenities rather than provide them in bottles and packages, recycle and use a paperless registration and billing systems.
- B. Some facilities are green certified because they use reclaimed material in their buildings, have native landscaping, maximize passive solar, compost trash and use green cleaning supplies.
- C. Perform site inspections to verify green claims.
- D. Use specific green language in contracts.

### Chapter 5 – Meeting and venue Selection

- A. Discuss green in first meetings with all players.
- B. Ensure green elements of contract are met with a site inspection.
- C. Contract venue to provide recycling, energy and water conservation practices, and environmentally friendly (i.e. organic) purchasing practices.
- D. Waste minimization is key to green conference planning.
- E. Incorporate specific green language in contracts.

### Chapter 6 – Transportation Selection

- A. Notify attendees of green policy and influence their choices through pre-event education.
- B. Educate your vendors and get them to comply with green practices.
- C. Analyze your transportation and shipping providers to ensure they are fuel efficient, dispose of waste effectively and have carbon offset programs.
- D. Contracts must contain specific green language.

### Chapter 7 – Food and Beverage Selection

- A. Don’t use individual water bottles.
- B. Choose seasonal and sustainable foods.
- C. Use a china service not paper and plastic.
- D. Reduce waste in every way possible, i.e. purchase bulk food, not packaged, don’t use plastic or polystyrene, eliminate boxes for lunches, and use live plants (rented) for décor.
- E. Practice “reduce, reuse and recycle” at all times and put it in contracts.

## Chapter 8 – Exhibition Production

- A. Choose a green venue with recycle bin on event floor, collection bins for uncommon waste (i.e. batteries), donation area for giving reusable items to schools and charities, and minimal lighting.
- B. Use reusable carpets and drapes, biodegradable and reusable shipping materials, carbon offset programs, and arrange for donation and retrieval of supplies.
- C. Make attendees use soy inks, recycled paper, reusable booth spaces and accoutrements and give them recycled and reusable giveaways and gifts.
- D. Incorporate best green practices like electronic card scans and nametags, and minimize printed materials.
- E. Include detailed green requirements in contracts.

## Chapter 9 – Communications and Marketing

- A. Share your green policies with everyone, including the media, and encourage green policy practices.
- B. Help attendees recycle, walk instead of ride, reuse linens, bring their own water container and reuse it, educate and appreciate them in using and for using green practices.
- C. Use digital media rather than paper whenever possible.

## Chapter 10 – On-site Office procedures

- A. Implement all of the practices you require of the venue, suppliers, staff and attendees.
- B. Teach by example.

## Summary, Appendix, References, Resources, Glossary and About Us

## V. PME Exam Preparation

### 1. Exam Composition

There are a total of 100 points available to earn for the exam, 80 of which can be earned from the multiple choice or true/ false questions that are worth 2 points each, and 20 of which can be earned from 2 short answer questions that are worth 10 points each. Please see below for the composition and distribution of the points in-depth.

Topics and Weights	
Event Planning Basics	15 MC questions (20 pts)
The Planning Process	15 MC questions (25 pts)
Designing An Event	15 MC questions (10 pts)
Contracts and Negotiations	15 MC questions (15 pts)
On-Site Logistics	20 MC questions (10 pts)
Essay Questions	2 Questions (20 pts)

You will have two hours to complete the exam. Those who have not made the effort to read the materials will have a hard time completing the exam within the allotted time, but for participants who have read the required readings two hours will be sufficient.

### 2. Exam Modules and Corresponding Key Words

Below, please find the terms and concepts that you should be able to define after having read the required readings. Please define the terms from the required readings rather than a dictionary. You will be tested on the definitions that authors have provided.

#### Event Basics

- ☞ Special Event
- ☞ Business & Educational events
- ☞ Banquet
- ☞ Association planner
- ☞ Event planner practices
- ☞ Fundamental elements of an event
- ☞ Budget
- ☞ Business casual
- ☞ Colloquium
- ☞ Conference
- ☞ Convention
- ☞ Corporate Planner
- ☞ Exhibition
- ☞ Familiarization Trip (FAM Trip)
- ☞ Independent Planner
- ☞ Silent Auction
- ☞ Trade Show
- ☞ Webinars
- ☞ Workshop

## **The Planning Process**

- ☞ Goal
- ☞ Objective
- ☞ Process Objective
- ☞ Meeting Agenda
- ☞ Meeting Pattern
- ☞ Group History
- ☞ Break-even Point
- ☞ Profit
- ☞ Deficit (future ROI)
- ☞ Fixed Expenses
- ☞ Variable Expenses
- ☞ In-kind Donations
- ☞ Outside Vendor/Supplier
- ☞ Outsource
- ☞ Pre-Event Meeting (Pre Con)
- ☞ Return on Investment (ROI)
- ☞ Sponsor
- ☞ Stakeholder
- ☞ Meeting Cycle
- ☞ AIDAC Formula

## **Designing an Event**

- ☞ A la carte
- ☞ Crudites
- ☞ English Breakfast
- ☞ Entree
- ☞ Hors d'oeuvres
- ☞ Open Bar
- ☞ Call Brand
- ☞ Premium Brand
- ☞ Well Brand
- ☞ Plated Buffet
- ☞ Tasting Plates
- ☞ Preset
- ☞ Audio Visual (A/V)
- ☞ Bandwidth
- ☞ Backdrop
- ☞ Back of the House
- ☞ Cash Bar
- ☞ Classroom Style
- ☞ Breakout Session
- ☞ Concurrent Session
- ☞ General Session (Plenary Sessions)
- ☞ Dais
- ☞ Exhibitor
- ☞ Half-round
- ☞ Horseshoe Seating
- ☞ Hospitality Suite
- ☞ Gifting Suite
- ☞ Keynote Speaker
- ☞ Kiosk
- ☞ Lanyard
- ☞ Lavalier Microphone
- ☞ Omnidirectional Microphone
- ☞ Table Microphone
- ☞ Unidirectional Microphone
- ☞ Wireless Microphone
- ☞ Lectern
- ☞ Plan Discussion
- ☞ Pipe and Drape
- ☞ Rear Screen Projection
- ☞ Rounds
- ☞ Venue Scouting
- ☞ Site Inspection
- ☞ Six by Six Rule
- ☞ Spec Sheet
- ☞ Theater Style
- ☞ T-Shape Set
- ☞ U-Shape Set
- ☞ V-Shape Set
- ☞ Feedback

## **Contracts and Negotiations**

- Proposal
- Request for Proposal (RFP)
- Act of God Clause
- Amenity
- American Plan
- Modified American Plan

- ☞ Americans with Disabilities Act of 1990 (ADA)
- ☞ Arbitration
- ☞ Attrition
- ☞ Contract Agreement
- ☞ Cancellation Clause
- ☞ Commissionable Rate
- ☞ Food and Beverage Minimum
- ☞ Comp
- ☞ Convention Services Manager (CSM)
- ☞ Cut-off Date
- ☞ Damage Clause
- ☞ Force Majeure
- ☞ Gratuity
- ☞ Guarantee
- ☞ Incidentals
- ☞ Indemnification
- ☞ Inventory List
- ☞ Liability Clause
- ☞ No-Show
- ☞ Off-season
- ☞ Peak Season
- ☞ On Consumption
- ☞ Overflow
- ☞ Rack Rate
- ☞ Run of the House
- ☞ Buyers Market
- ☞ Sellers Market
- ☞ Service Charge
- ☞ Termination Clause
- ☞ Walked
- ☞ Sarbanes-Oxley Law

### **On-site Logistics**

- Contingency Plans
- Drayage
- Evaluations
- Meet-and-greet
- Move-in and Move-out
- Podcasting
- Post-Convention Meeting

### **Greening an Event**

- ☞ Biodegradable
- ☞ Carbon Offset
- ☞ Compost
- ☞ Ecotourism
- ☞ Energy Star Equipment
- ☞ Energy/Water Conservation
- ☞ Environmentally Responsible Transportation
- ☞ Fair Trade
- ☞ Green Sealed Certified
- ☞ Kilowatt Hour
- ☞ LEED
- ☞ Organic
- ☞ Recycling
- ☞ Shade Grown Coffee
- ☞ Vegan
- ☞ Vegetarian
- ☞ Vegetable-Based Inks

**3. SAMPLE QUESTIONS:** (Answers are on the last page of this study guide.)

1. *Which of the following is NOT critical to the initial conceptualization and vision establishment of an event?*
  - a. Defining the client company's goals and objectives
  - b. Negotiate contracts with caterers and other service providers
  - c. Research venues based on event type and size
  - d. Determine how much money the client is willing to spend
  
2. *True or false: it is essential for a comprehensive and effective event management team to have members who specialize and are given distinct responsibilities in the areas of operations, marketing, finances and legal matters?*
  
3. *Before you choose a venue, you should:*
  - a. Create a "blueprint" of your event that includes number of attendees and space required
  - b. Have in hand a list of must-haves in a facility
  - c. Have a timeline and checklist showing when each phase of planning and implementing needs to be completed
  - d. Both "a" and "c"
  - e. Both "a" and "b"
  - f. None of the above
  
4. *When planning an event, you will have to negotiate contracts with venue and service supplier, and perhaps with speakers, celebrities and entertainers; essential elements of good contracts include:*
  - a. Oral agreements about goods or services provided
  - b. How to get out of the contract and/or resolve conflicts
  - c. How parties will communicate
  - d. Both "a" and "b"
  - e. Both "b" and "c"
  - f. None of the above
  
5. *Logistics of an event include:*
  - a. Transportation and guest accommodations
  - b. Contract negotiation and insurance and permit acquisition
  - c. Attendee registration
  - d. On-site security
  - e. Both "b" and "c"
  - f. "a", "c" and "d"
  - g. All of the above
  
6. *True or false: "green" meeting and events are those that feature topics on the environment, energy alternatives, pollution control, safe drinking water and other topics about sustainable living.*

7. *The following resources are available and a big help to event planners:*

- a. Planning and management associations and organizations
- b. Speakers bureaus and conference planning clearinghouses
- c. Planning and management web sites and software applications
- d. Trade magazines and blogs
- e. Companies that specialize in green event services
- f. All of the above

VI. None of the above

**VII. FAQ:**

Have more questions or need more information? Please see our **FAQ (Frequently Asked Questions)** section on the BusinessTraining.com website here: <http://BusinessTraining.com/FAQ/>

You can also get in touch with the BusinessTraining.com team over email at [Support@BusinessTraining.com](mailto:Support@BusinessTraining.com), or by phone at (305) 503-9050 and through our ClickAndChat tool, accessible from our homepage: <http://BusinessTraining.com>.

Thanks for joining BusinessTraining.com! Please let us know if you have any questions.

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## VIII. SAMPLE QUESTION ANSWERS:

1. *The correct answer is "b."* Per Judy Allen in Event Planning, chapter 1, the initial planning phase is primarily about determining event objectives and vision, a preliminary budget, and defining the five "Es": elements of the event, essential must-haves, the environment's venue and style, the energy or mood of the event and the emotions or feelings the event should evoke.

2. *The correct answer is "True."* Shannon Kilkenny emphasizes on page 54 of *The Complete Guide to Successful Event Planning* that designated team members take on responsibilities in these four areas during the early planning stages and maintain their responsibility throughout the event.

3. *The correct answer is "e."* Event Planning's Judy Allen advises that a blueprint of the event vision and objectives be created before venue shopping commences. In chapter 3 she points out that there is no point in considering a venue that can't accommodate the attendee base, doesn't suit the mood of the event, or has cost-prohibitive rates; the blueprint defines all of the essential elements of a suitable venue and helps ensure the right choice.

4. *The correct answer is "e."* Kilkenny's *The Complete Guide to Successful Event Planning* repeatedly stresses the importance of "get it in writing." Oral agreements cannot be proven or enforced, but written contracts protect you and your client, and can be amended as needed.

5. *The correct answer is "f."* While contract negotiation, insurance and permitting are all essential to a successful event, they should be completed during the planning stage. According to Event Planning's Judy Allen, the term "logistics" applies to the essential activities that take place once the event has begun and just prior to and immediately after it.

6. *The correct answer is "false."* While there are many meeting, expositions and conferences dedicated to environmental causes and topics, Amy Spartisano in *Simple Steps to Green Meetings and Events* describes how you can take a "green" approach to event planning by taking steps to reduce energy consumption and water and other waste, while promoting good air quality and use of eco-friendly products.

7. *The correct answer is "f."* Kilkenny's *The Complete Guide to Successful Event Planning* lists over 80 web resources alone that provide advice, tips, resource links and services to event planners worldwide.