

How to Create Successful CSM-Planner Collaboration

Q: What's the key to working successfully with my CSM?

A: Honest and regular communication.

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WHEN ASKED WHAT THEY'RE MOST GRATEFUL FOR, suppliers and planners alike consistently list returned calls and emails, timely event changes, specificity and honesty about needs and expectations, and clear communication, even if it's only to acknowledge a challenge and to indicate a solution is forthcoming. ¶ Your relationship with any convention services manager (CSM) requires time and attention. The good news is countless opportunities exist during the planning of an event to practice successful communication. Here's a timeline of those opportunities leading up to your event:

Contract signing: Meet your likely CSM. You'll glean invaluable insight into the venue's culture.

One year: CSM becomes your primary contact. Add this individual to all contact lists, schedule a preliminary site visit and share pertinent information (e.g., group profile/quirks, historical figures and past experiences, as well as current-year objectives, budget, ideas and roadblocks).

Six months: Submit a preliminary agenda, help your CSM clearly envision the event and resolve any major red flags.

90 days: Submit meeting space assignments and estimated meal cover counts, set up the master account and discuss exhibit show plans (e.g., nature of the show, shipping details, move-in, move-out and security needs).

30 days: Submit event specifications (e.g., menus, room setups) in writing, along with a rooming list. Conduct a final contract review and submit pertinent information (e.g., arrivals/departures, luggage storage, off-site events/tours, media and press, signage, parking and gift deliveries/amenities).

Two weeks: Mark up and return signed banquet event orders (BEO), review the internal group resume and submit the final conference program for routing to all venue staff.

Guarantee time: Submit final guarantee numbers and special meals.

Arrival day: Greet your CSM, participate in a pre-con meeting, discuss last-minute changes and share on-site staff expectations.

During event: As everyone works from the

BEOs, check function space one hour prior to start time and review billing as time permits. Have serve counts and other feedback about attendee likes/dislikes routed through your CSM.

Departure day: Write and disseminate thank-you cards, offer gifts or gratuities, share a list of exceptional employees and say your goodbyes.

Post event: Hold a post-con meeting with your CSM. Discuss what worked and what could use improvement. In addition to reconciling the venue's invoice, adjust room blocks and meeting space for future years.

In the end, successful conferences are built upon successful relationships. The earlier you're able to establish a good working rapport with your CSM, the better. You'll also want to leverage your calendar or other task-management software to prevent missed deadlines or collaboration opportunities. ¶



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