



A HOW-TO GUIDE by Meeting Professionals International

The Keys to Creating, Curating and Cultivating Strong Partner Relationships

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MEETING ORGANIZERS AND DESIGNERS

work with vendors and suppliers all the time. In a best-case scenario, these relationships help both parties shine and do their work better, but as with any relationship, challenges crop up, misunderstandings happen and surprises leave event teams scrambling.

In a survey of meeting professionals and hotel sales representatives published by the Incentive Research Foundation in 2017, both sides said they viewed their relationships with the other as collaborative or supportive but, depending on the role hotel representatives played, the percentage of planners who rated the relationship as one of trust or true friendship was just 11% to 22%.

When Joan Eisenstodt, principal of Eisenstodt Associates in Washington, D.C., recently helped a corporate client train its meeting staff on how to negotiate, she arranged a hat decorating exercise. Afterward, the planners returned to their offices with the caps to decorate their desks as a reminder to put on their business “hats”—and think about events from all perspectives—including that of the partners across the table.

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“We have to understand the value of business from both sides and put aside some of the issues that are only for us,” says Eisenstodt, whose firm specializes in meeting consulting, facilitation and training.

Fortunately, it is possible for meeting professionals to optimize these relationships by utilizing the expertise and vision of their vendors to improve the experiences of attendees and drive business for their companies or organizations. This white paper presents the right questions to ask to create positive results with vendors and show you how to improve your meetings by making the most of partner relationships.

By applying the time-tested strategies of their peers, vendors and industry

may not be ideal for another. “My feeling is great relationships start with all sides asking a lot of questions,” says Gary Schirmacher, CMP, senior vice president of industry presence and strategic development at Experient.

If an event will be held at a hotel, those first questions should often go to the venue. It’s essential for meeting planners to inquire if the property has a “preferred vendors” list that covers audiovisual companies, caterers, visual branding experts and other regularly used providers that know the hospitality company’s requirements well.

“Try to leverage hoteliers,” advises Jayson Haynes, managing director of hospitality & convention operations at FedEx Office. “They have seen a lot within their

venues and careers. Let them guide you to the very best vendors in this space. Really try to leverage their site-specific expertise and experience.”

Although planners may have favorite vendors, there could be financial disincentives for using those who have not yet been vetted by the hotel’s internal team. Some hotels have awarded exclusive contracts to preferred outside vendors, particularly in audiovisual, and these companies may know the hotel and venue better than other suppliers. On the other hand, your preferred partner may know your group and organization better.

To get great referrals from a hotel, it is important to ask detailed questions. When Lynn Pryor, CMP, the Atlanta-based director of conference services at Integress, a full-service meeting and event resource company, reaches out to hotels about vendor selection for the meetings she plans, which are often in the scientific space, she asks the following questions of the hotel.

- Who are your preferred vendors?
- How do you think they can handle our program?
- What is the potential for them to help us minimize risk?
- Do you have vendors whose sustainability efforts we’ll be able to highlight?

No matter what the route to connecting to a vendor, it is important to assess a partner’s capacity for tackling the event at hand. A vendor who is ideal for one type of event may not be the right choice for a different one. “Looking for those partners who have the scale, capabilities and experience to accomplish the goals of the meeting is important,” Haynes says.

Haynes recommends that planners ask themselves some key questions regarding potential vendors.

- Does the partner have the scale and experience to deal with and successfully accomplish the goals of the event – whether large or small?
- Does the partner have the resources to accomplish what is required for that particular event—and a track record of doing so?
- Does the partner have experience at the property you are considering?

“That experience onsite is really important,” Haynes explains. “Do they have the knowledge of how to work in that property to optimize the investments that meeting planner is making?”

But the hotel should not be the only source of information on a vendor. “Speak directly to the partner,” Haynes recommends. “The partner, if they are local or have a location inside the event venue, will be able to give you all kinds of insight as



experts, meeting professionals will be able to design effective and business-driven events and create partnerships, rather than transactional sales relationships. As Tammy Bradley, CMP, senior account executive at AV-Canada in Mississauga, Ontario, and MPI Toronto Chapter president, puts it, “It is important to work closely with all parties involved with an event to become one unified team.”

Getting Off to a Strong Start

Great partner relationships start long before any contracts have been signed. For planners, assessing the fit of any vendors they will be working with is critical. A vendor who might be great for one meeting

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to how to work best within the property. They can also advise how to work best with the venue's leadership team and will know what is acceptable to that team. There is a lot you can learn from communicating with and asking great questions of a knowledgeable vendor."

Pryor, at Integress, often asks vendors the following questions:

- Here are our goals and objectives. What feedback can you share?
- How can you help in marketing the event? Can we pull together some integrated marketing strategies, such as web links?
- What services do you offer meeting planners that are unique to your city?
- What are some of the special events in your city? How do you enhance the attendee experience?
- What are some ideas you would recommend as cost-saving measures for your city? How can I save money, so I am not over my budget?
- Can you provide some visual examples of past events I can show my clients?

"The most important thing in working with your vendors to get the most out of them is to make sure it is a win-win relationship for both, so they truly feel there is a partnership there," Pryor says. "In this business, word of mouth is important. You want to make sure everyone walks away feeling good."

Meeting organizers and designers should also be prepared to answer questions from vendors. The best ones will have their own lists.

Asked what distinguishes the meeting professionals who are easiest to work with, Bradley says, "They provide me with all of the information up front. I'd rather have too much information than not enough. I may not need to know if you are serving chicken or beef at your event, but if I know the theme and messaging of an event I can use audiovisuals to amplify that message."

The biggest mistake meeting professionals can make in working with vendors is not sharing their budget, says Bradley.

"In a 50' x 70' room, I have done events where the AV cost \$5,000, and I have done events where the AV cost \$200,000—in the same space," Bradley says. "Just asking for projection and sound doesn't provide me with enough direction to design the AV in the room. If the meeting organizer states their budget up front, it provides me with a realistic view of their expectations."

Taking the Long View in Negotiations

A successful relationship between a meeting planner and partners flows from a contract that is fair to both parties. A good first step is making sure everyone under-

TOP 5 WAYS TO PARTNER SUCCESSFULLY

1. Make sure the vendor is a good fit for your event.
2. Negotiate with an eye on building a long-term relationship.
3. Set clear expectations for the project—and track progress.
4. Prioritize open communication.
5. Enlist your supplier as a partner and consultant.

standing what the contract means.

"A lot of times, the people making the decisions don't realize they aren't comparing apples to apples," says Tyra Hilliard, CMP, an attorney based in St. Simons Island, Ga., who is also an assistant professor of hospitality and tourism management at the College of Coastal Georgia. "Sometimes it takes having someone you trust explain exactly what's included—what additional fees there are, what additional equipment they might need, if there are delivery fees or gas surcharges like there have been in the past. That's the tricky thing about trying to make decisions just on bids, just on proposals, just on dollars and cents. Numbers lie. In a vacuum, they can't be trusted."

Eisenstodt finds herself gravitating to partners who will, if she doesn't understand a clause in a contract, research the answer for her. "They would say, 'I don't really understand it, either. Let me find out—as opposed to saying, 'It is our policy,'" she says. "That's not a good answer."

Eisenstodt recommends that meeting professionals take improvisation classes to become better at the type of on-the-fly conversations that need to take place in contract negotiations. "It's understanding how to really listen to someone that improv teaches you," she says.

Both sides also need to be mindful of the long-term implications of decisions made in a particular contract, Eisenstodt says.

"There are planners who still expect a lot of personal perks from suppliers, and suppliers that think they need to provide them without thinking about the long-term implications of doing so," says Eisenstodt. "The more I get this time as a planner, the more I am going to expect the next time, whether it is for me personally or for the client. I don't think we are being smart about how we do business or how we look at relationships."

However, when both parties do strive for fairness and take the long view, planners say, things tend to fall into place.

"No matter what it is you're looking for, if you find the right supplier, as long

as it's a balanced agreement and there is integrity behind it, it's usually a good match," says Kelly-Stewart. "You match the right supplier with the right customer and, if they are honest about what they can deliver and there is integrity there, it usually works out."

Many organizers find that their efforts to negotiate fair contracts that work for both sides pay great dividends. Linda Nelson, CMP, president and CEO of To Plan Ahead LLC in Asheville, N.C., has found that her consistency in negotiating with vendors in a way that keeps both parties happy has been a steady source of referrals from existing clients.

"I really do look for a win-win," she says. "I know that's a cheesy thing to say, but I do make an effort to understand the client's needs, the vendor's needs and my needs. I put it all together and really do come out with a good negotiated contract that helps everyone. Over the last few years I have gotten referrals. They say, 'I hear you are awesome at negotiating. That's something very sensitive to us.'"

One area that is ongoing and not easy to resolve is commission cuts. Earlier this year, Hilton Worldwide and Marriott International moved to cut commission for group bookings from 10 to 7%. "There are third-party, commissionable individuals who are saying they will not book with certain hotels companies that lowered the commission from 10% to 7%," says Eisenstodt. "They are going around hotel sales people and straight to the owners, [saying] since we can't get the additional 3%, here are the perks you have to give me."

Eisenstodt believes the only answer to this situation is opening up more discussions about it. "The industry is setting up barriers and not having the conversations about 'How do we come to terms with what is good business—what is good, ethical business?'" she says. "How do we ensure that we can provide information and request information so that we can, in fact, develop a relationship that's going

to result in both a healthy bottom line for both parties and healthy outcomes for people that are participating in the meeting. I don't think we are looking at it that way. We're being purely transactional."

Bringing Clarity to Collaboration

It is easier for vendors and other partners to meet the expectations of a meeting organizer if goals and objectives are crystal clear. Meeting professionals who are adept at communicating their expectations, in RFPs, contracts and ongoing conversations, have an advantage when it comes to making the most of relationships with vendors.

Schirmacher recommends that anyone who has an agreement with a vendor or partner creates a statement of work that clearly outlines what each party is responsible for. He also advises that planners create an event "org chart" to help vendors understand who, in the chain of command, can make certain decisions or provide specific information. "There are some key things you have to understand, like what the escalation process is," he says.

Once working with a vendor, Schirmacher uses a scorecard system, setting key performance indicators (KPIs) for vendors that show them what success looks like, everywhere from the RFP process through planning, execution and post-event conversations. "It's really saying, 'What are my metrics that a partner has to deliver?'" Schirmacher says. Knowing those metrics makes it clear to vendors how they can knock it out of the park.

The scorecarding includes both concrete deliverables and core elements of the company's relationship with vendors, Schirmacher says. "What drives most of these services is there are people involved," Schirmacher says.

When it comes to the "people" side of the equation, an assessment of a vendor might look at whether it has a culture that meshes well with both Experient's and the client's. A vendor's size and technical capabilities might be considered relevant to the success of the relationship on the scorecard.

Schirmacher also looks at the partner's communication skills and how often communication takes place with his team.

This goes beyond communication between the planner and vendor, at times. For vendors that subcontract, Experient's team might also look at how successfully the subcontractor works with the vendor. "Do they get along? Do they even talk?" Schirmacher asks.

Many meeting planners recognize that they play a role in creating the type of communication with vendors that makes events successful. Anticipating situations where a relationship might stray is impor-

tant.

"I think one of the common things, especially when you first start with the vendor, is scope creep," says Schirmacher. "All of a sudden the vendor might be working a lot more hours than they thought they were going to have to."

To prevent frustration, it is important to put "triggers" into an agreement around factors such as hours worked, Schirmacher says. "Let's say our ceiling is 200 hours," he says. "At 150 hours we might have a trigger that we have a discussion." That discussion includes questions. Why is the partner tracking a higher number of hours than anticipated? What tasks are taking more time than others? What is the solution?

It is also important to initiate conversations about any roadblocks that may be preventing information from flowing

the way it should, Schirmacher finds.

"There may be people who are critical that aren't allowing themselves to be engaged," Schirmacher says. "An example of that might be the client's IT department and its engagement with the registration vendor."

Setting a tone for open discussions without "one party thinking they might get fired or the other party thinking they might get asked for more money" is also essential, Schirmacher says. While the beauty of live events is the surprises they come with, those unexpected elements should be good things and not a mic or LCD projector that does not work, Schirmacher says.

A climate of openness led to positive results when independent meeting and event planner Darlene Kelly-Stewart, based in Ottawa, Canada, helped a client plan a helicopter association conference recently.



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When the client realized that it would be easier to manage the event if both the registration technology and the technology used to manage the group's room block were connected, it initially appeared that linking them might be challenging, given the technologies were from two different brands.

However, the two vendors quickly teamed up and found a way to connect the programs. "It was really a collaboration," Kelly-Stewart says. "They used this conference and my client as a test case to see if it could work. It ended up being very simple for them to do."

Optimizing Relationships

As founder and president of Sweetwater, a supplier of professional audio musical equipment for events and concerts, Chuck Surack often gets last-minute orders. “We ship later than anyone else in the country,” he says. “They can call us at 7 p.m. tonight and we’ll have it in Los Angeles at 7 a.m. tomorrow.”

The company’s location in Ft. Wayne, Indiana, helps with that but so does “the magic of FedEx, UPS and counter-to-counter airlines,” Surack says. And if the purchaser has trouble using the equipment, he’s ready and able to deploy a member of his large technical support team to the location to help.

Great results like this flow from a deep commitment to making sure the event is successful. “It’s all about communication,” Surack says. “We absolutely make sure we are communicating with all of the people involved—the purchasing people who are ordering it, the people in the warehouse who are receiving it and the IT and technical people who are installing it. We’re there

president of client solutions at Freeman.

“Open, honest communication has been the best tool in keeping the relationship on track for the long term,” Walker says. “If my customer doesn’t have the budget, my vendor/partner needs to know and we work together to find a better solution. If my vendor/partner has challenges meeting my needs or if I, as a vendor/partner, have a challenge meeting my customer’s needs, we need to be honest and upfront in communicating that and commit to find a solution that works for all parties. It’s the only way that a long-term relationship can ultimately spell success for everyone.”

Trust is an important component of the relationship, says Walker. “If there isn’t a trust that my goals are just as important as the vendor’s goals, it isn’t going to work,” he says. “The reverse works as well. If I understand the challenges of the vendor and why things cost what they cost, I’m much more inclined to go to bat for that vendor knowing that he or she has my best interests at heart and will protect my event and my budget from surprises.”

The earlier the communication, the better the relationship on both sides, says FedEx Office’s Haynes.

“Collaboration and information-sharing from the outset allows vendors to plan, source and allocate resources appropriately, thereby better ensuring success and reducing costs for both parties,” says Haynes. “As an example, many events we’ve supported involve awards shows at the end. When the meeting planner lets us know that up front, we’re able to ensure we have the appropriate labor and supplies on hand to package the awards and ship them home for the attendees.”

Of course, it helps to select the right vendor in the first place. Walker finds communication

is easiest with vendors who are looking to build long-term relationships.

“When a vendor only looks at the single project ... or only focuses on the ‘deal’ in play, that can be a real turnoff for future business and push the needle toward shopping the deal in the future,” Walker says. “Undisclosed surprises from a vendor can make what could be a good, long-term relationship turn into a ‘one-off’ relation-

ship that ensures that the vendor will not be considered again.”

The vendor’s goal should be winning short-term business, he says. “If I can’t make it work, I should commit to finding someone who can, servicing the customer as a friend, even if I lose the short-term business,” Walker says. “My goal should be to develop a customer for life, not just to win a deal.”

Strong vendors will know when to read between the lines. For instance, when a meeting organizer cites a limited budget for a particular aspect of an event, it may mean the organizer does not understand the value of particular products and services, notes FedEx Office’s Haynes. In those instances, a vendor’s firm understanding of its core products and services can help extend small budgets and meet or exceed expectations.

For one recent event, a host hotel invited FedEx Office’s team to a site visit specifically to help a client with a tight budget understand its options for branding its event.

The hotel’s initial request was for FedEx Office to place basic foamcore posters on easels outside ballrooms. “The customer expressed concern, that attendees not waste time, shuffling aimlessly seeking specific seminars,” Haynes says. “Acting as a consultant, rather than an order taker, FedEx Office suggested double-sided meterboards. Meterboards are much taller, can display far more information, and their double-sided design means they can be strategically placed throughout the foyer, increasing visibility for improved traffic flow and reduced congestion during meeting transitions.”

The customer also wished to place sponsor logos on several podiums. “The challenge was visibility, due to their slender, tapered shape in large ballrooms,” recalls Haynes. “FedEx Office suggested podium fascia with three, large foam panels. We explained this would not only increase visibility but could also command more sponsor revenue. The customer agreed to move forward with the custom podium fascia/panels, several meterboards and event print collateral. As a result, the customer was pleased and the hotel now better understands the capabilities of FedEx Office as a valued partner in the preplanning process.”

Changing from Vendor to Consultant

In best-case scenarios, a vendor plays a strategic, consultative role to a meeting planner, not simply taking orders but offering insight on how to run an event better.

Schirmacher actively looks for vendors who suggest new ways to get involved by offering valuable services his company could utilize or opportunities to learn about new ways to design and conduct events. “What kind of learning opportunities are there?” he asks himself. “What ability do I have to see the latest thing they are doing?”



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to follow up and make sure everything is working. We have a company of 100 employees who make sure installations are done correctly. It’s about owning it from start to finish to make sure everything is correct.”

Meeting planners have many opportunities to open the door to the type of communication that helps an event succeed, according to Bob Walker, senior vice

Tasked with quoting flyers for a comic book company that was exhibiting at the 2017 Comic Con, FedEx Office noticed the flyer mentioned a special event to be held at a high-profile nightclub a few blocks from the venue, Haynes recalls. FedEx Office researched the nightclub and realized it was an ideal venue for branding. They pitched the idea to the client and introduced them to some of the branding products the company offers, including large colorful wall graphics. "Once we explained the benefits of branding at this venue, they agreed to move forward," he says. Haynes leveraged the creativity and support of multiple departments at FedEx Office to ensure the event was successful. "It was truly a team effort," he says.

Event and branding efforts proved successful. Even better, the nightclub, with which FedEx Office developed a strong relationship during the preplanning and branding installation, has since called on FedEx Office to brand other events.

For more straightforward purchases that don't require as much strategy, finding partners who are willing to customize

offerings, instead of rigidly adhering to cookie-cutter solutions, can make a planner's job easier.

Kelly-Stewart has found that if she mentions a particular challenge she is trying to solve, some vendors will rise to the occasion, while others won't. In the food and beverage area, for instance, she has found that many hotels will charge for a minimum of 20 staff and crew meals, even if, for instance, she has nine team members, as at a recent event. While some hotels won't adapt the charges, she recently found one who, when she mentioned this issue, said, "That's an excellent point," and was willing to customize.

Adaptation and flexibility give the hotel an advantage in her book. "One solution doesn't fit all," Kelly-Stewart says. "The ability to be flexible is very attractive. Sometimes, instead of a straight line, you need a wiggly one."

She also looks out for those who really listen when she explains her needs and who embrace the role of partner. For one meal that's coming up, she says, the hotel has told her it will cost her extra to serve it buffet style. "I really want it buffet-style," she says. "I have six people who aren't go-

ing to be there when it's plated."

In cases like this, she says, she looks for a partner who understands that price is not always the most influential factor. "If there is a cost to it, fine, then tell me the cost. Then, I can make a decision."

Sometimes, it may take time to find partners who are flexible in some industries, so meeting professionals need to budget time for the hunt. The bottom line for both meeting organizers and partners is that they create symbiotic relationships, and that neither can succeed in pulling off an outstanding event without the other's collaboration.

Fair contracts, clarity about goals and deliverables, communication, a spirit of friendship and a consultative relationship all contribute to the creation of memorable events. By taking steps to avoid common pitfalls that can derail a relationship, planners can build lifetime collaborations with trusted partners, vendors and suppliers in every industry that are relevant to their business, that help both parties thrive and that continue to deliver great results.

In the end, as Schirmacher puts it, "It's all about the customer."



Meeting Professionals International (MPI) is the largest meeting and event industry association worldwide. Founded in 1972, the organization provides innovative and relevant education, networking opportunities and business exchanges, and acts as a prominent voice for the promotion and growth of the industry. MPI has a global community of 60,000 meeting and event professionals including more than 17,000 engaged members and the Plan Your Meetings non-traditional meeting planner audience. It has more than 90 chapters and clubs in 24 countries.

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