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Operations Best Practices -
Beyond Design

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Stakeholder Management

Stakeholders are defined as anyone with a vested interest in the outcome of the project. For our purposes, this includes the event owners (program hosts, often the C-suite), suppliers (host hotel, DMC, event management agency, travel agency, etc.), internal teams (such as procurement, marketing, finance), sponsors (if applicable), and even the attendees themselves. Each have their own sets of expectations for their gains as a result of the program. Operations teams will need to know how to interact with and satisfy each set and must have a plan for doing so. Once you've identified who are your stakeholders and what they need, you will need to outline how YOUR team will advise, update, report to and work with each set along the entire project timeline. Within your team, identify who will communicate and manage the process.

Remember that stakeholders at all levels are relying on your expertise and professionalism. In all communications, be courteous, concise, on time, on point, and on top of it all. Anticipate their concerns and questions in advance. Remain at all times collaborative in your approaches; listen carefully, analyze the requests, concerns, or situations, and be prepared to come up with solutions with a can-do attitude. Often, requests come in from the C-suite that may seem out of left-field, but if you ask what are the ultimate objectives behind the request before responding (or putting your face into a scream pillow!), you may actually have an even better solution to offer and/or a great work-around! However, don't be afraid to stand up and address your concerns. If you find yourself losing sleep over something that you just DO NOT see working out well, or if you see real concerns in the ability to deliver on expectations, express why you are concerned and what other options might be better suited. A "Yes" person could actually do a disservice to everyone and could put the program's success in great danger.

Think through risks, plan for success, share your vision, and be clear about what is and is not realistic so that together all stakeholders can work through solutions.

Building and Managing Your Operations Team

The importance of building a team that works well together cannot be underestimated. Project teams do not spontaneously come together and make magic, but a poorly coordinated team can be disastrous to the program's success. Here are a few top tips for assembling your high-performance "dream team".

1. **Select Wisely -** Your operations team will likely consist of a combination of internal and external people to your organization. The process begins with great leadership and an understanding of human psychology. Internally, ensure that everyone on your team is not only skilled and experienced in their ability to deliver, but also that they are excited about and passionate about the success of the program. Because Operations can be highly stressful and demanding at weird hours of the and on crunched timelines, look also for their ability to handle situations calmly and effectively under tension. It's equally important to assess personalities so that you can assemble teams that match and complement one another. On-site team members who travel with the program must be able to stay "ON", in a positive mindset, and with a capable, confident, can-do attitude; but they must know that they can rely on their "office" counterparts to pull together critical information and support from the back end.

   When selecting your outside suppliers, price is not nearly as important as are people and professionalism. Look for vendors who not only have great experience, but look for those who understand your project, your process, and your people, too. Look for solution-oriented vendors who ask for more than just the nuts and bolts of your program, but who are also asking about what you are ultimately trying to build. To continue the analogy, are they also architects with the skills to deliver, and are they backed by resources who can step or add value? This is important especially for your choice of host hotel, your event operations partner, your DMC, and your travel partner.

   Be sure that each of your key teams supporting you are educated about the project and its values, are clear about the expectations, and that they all have clearly defined roles. Make sure that everyone understands where their piece of the puzzle fits into the larger picture and who are the go-to point persons when tasks and deliverables intersect with the other teams. It's also important to ensure that each person on your team has the time and focus to dedicate to the project, as best performances can be hindered by overload.

2. **Build & Maintain Trust -** Project leaders must be able to read and manage people, assess situations, and communicate effectively. As team leaders, these people see the bigger picture, delegate well, and stay engaged in the process. They look to ensure that the entire team has clear structure and that there is accountability for every team member. They engage often, listen well, provide ideas, and fight for their teams and their needs as needed. The project leaders need first to be seen by all members as credible and qualified - worthy of respect and position. If there are doubts about any team member, especially the leader(s), mutiny is possible! Establish trust, approach all team members with respect, and be genuine. For rules of engagement, everyone on the team must feel that their role is valued, that their voice can be heard, and that others are equally engaged. Check in with teams to find out how they're doing and how they're feeling, and work with them to resolve issues before challenges become problems. You'll need everyone on point to pull it all together, especially for the on-site program!

Project Management - Travel Program Operations

Staying organized is key. Here are some tips on setting expectations for the planning process, selecting technologies, and understanding staffing needs:

1. **Hold a Kick-Off Meeting -** Using a Project Charter, hold an event kick-off meeting to talk about the program with your team. Consider inviting key vendors, too. Allow for questions, be willing to poke holes in the plans, and ask for feedback from your leads.

2. **Status Updates and Reports -** During the operations implementation process, hold regular meetings with clear agendas, status reports, and action items. Point out and discuss needs, and give stakeholders updated and relevant reports. Highlight quick analyses and be prepared to answer questions.

3. **Task Management - Collaborate & Communicate -** Technology can be very helpful here. Consider implementing a cloud-based software program (including those with easy app access and a desktop version) that can be easily accessed by all - at any time, from anywhere. Come up with simple solutions to work through documents in real-time, with controlled access to view, comment or edit. Several project management software programs integrate with other cloud-based tools such as Google Docs, Dropbox, or other. Share documents, set timelines and reminders, and send updates and communications that are relevant to the recipient. No one needs everything - not even the project manager. For example, the travel agency may need to see in real-time registration reports and data for attendees to book and manage flights, but the agency does not need to provide minutia detail to the rest of the team.

   It's a good idea to run through with your key vendors all of the "jobs" that will need to be done and discuss who is responsible, by when, and to whom to report. Divide the workload into high level tasks and allow teams to manage the breakdown. Set milestones, and add descriptions. Keep files handy for collaboration - some in PDF non-editable form, and some as working editable documents.

   To build a timeline, consider starting with the high level "big rocks" - the key priorities and big deadlines by month or exact date (based especially on vendor contracts), and fill in the smaller stepping stones. For example, if housing room lists are due 30 days prior, back up your deadline by 5 - 10 days for wiggle room and to "be a hero" when someone responds late (it will happen!).

Before your event, start building a shared folder for "On Site Documents" - those key documents that will help you run your program's day to day ON SITE operations. These might include your Event Operations Manual, your day-by-day project and task timelines, your registration files, banquet and event orders, travel manifests, and more.

4. **Follow Standard Industry Practices -** The Events Industry Council changed the face of event planning when they introduced APEX, the Accepted Practices Exchange. This set of tools was created in an effort to define common terminology and lay the foundation for companies to implement these standards universally and across the board. International definitions were established and are widely in use. For best results, use the APEX or other Events Industry Council tools, templates, and guidebooks to support your operations and to communicate effectively with your supplier teams, vendors and host venues. There are also a number of templates shared within THIS toolbox available.

5. **On Site Tools -** Long gone are the days of the Event Planners' or Operations/Tour Director's printed "Bible". Not only are paper documents heavy and cumbersome, but they are often quickly outdated and irrelevant. Instead, consider having a few key contact sheets, contracts, and your Event Operations Manual printed. Have documents just in case wifi or your phone, laptop, or tablet fail, but consider that documents in the cloud could easily be reprinted from another source within a short period of time, if needed. A good example of a working document to have online is your on-site attendee registration spreadsheet: your registration desk team can easily update who has arrived, who's en route, and what needs to be resolved and when. Consider your registration platform's capabilities, too, as a means of allowing best real-time information. Robust platforms have been developed and have evolved specifically to address event planner needs; few find it worth the time, money and resources to reinvent the wheel.

6. **On Site Communications -** There are some great apps to facilitate communications, even along international borders. WhatsApp is a current popular easy and effective example; you can develop chat groups for key teams and remain in constant and clear communication. The most important thing is to stay in touch and abreast of what's happening. Establish early what channel and platform you will use, and outline a chain of command. Work closely with your third-party partners to outline a clear line of communication.

Plan for crisis communications. Start first by preventing your own internal crises: have back-up plans, printed phone numbers, offline maps, printed email addresses, venue addresses, and vendor contact information just in case something goes awry. (This is great information to store in your Event Manual - see Toolkit resources). Consider as well how you will inform and disseminate instruction in the event of a crisis (natural disaster or other) OR in the event of CHANGE to the agenda (weather issues, travel carriers, cancelled functions, timing updates, etc.). Will your registration platform or app be effective? Will everyone have access to a phone, and will internet access or roaming be possible? Is text also effective, or will you also need to consider print items? Know your audience and provide multiple streams of communication. It's important to communicate clearly, to stay calm, and to stay confident.

7. **Additional Event Registration Tips -** Event Registration is key to effective communications before, during and after a program. The more centralized your strategy, the better. Consider platforms that will easily offer all relevant event information as well as the means to communicate with your attendees in real-time, to target messages to specific audiences, and to allow for engagement. Event registration and attendee communication should be easy and intuitive. Technology options include building a mobile-, tablet-, and desktop-friendly website and/or housing your event information webpage with the basics about the event.