cmp International Standards

events
industry
council

cmp
certified meeting professional

About the Events Industry Council

The Events Industry Council's 33 member organizations represent over 103,500 individuals and 19,500 firms and properties involved in the meetings, conventions, and exhibitions industry.

The new mission of the Events Industry Council is to strengthen the value and sustainability of our members, support the premier credential for the meeting professional, and provide a vibrant, collaborative platform to address critical issues to ensure a thriving events industry.

33 MEMBER ORGANIZATIONS

REPRESENTING OVER

103,500 INDIVIDUALS

19,500 FIRMS & PROPER TIES

About the Certified Meeting Professional

The Events Industry Council launched the Certified Meeting Professional (CMP) program in 1985 to enhance the knowledge and performance of meeting professionals, promote the status and credibility of the meeting profession, and advance uniform standards of practice.

Today, the CMP credential is recognized globally as the badge of excellence in the meeting, convention, exhibition, and event industry. The qualifications for certification are based on professional experience, education, and a rigorous exam.

The CMP exam was developed and is maintained by meeting professionals from all over the world who volunteer their time to ensure that the program reflects current best practices in the meeting management field.

More than 11,000 meeting professionals in 55 countries hold the CMP designation. This unique community represents professionals in every sector of the industry, from corporations and associations to government agencies, hotels, destination marketing organizations and conventions centers, and meeting service providers.

The CMP program increases the expertise and sophistication of meeting and event professionals in all sectors of the industry by:

- Developing and maintaining a comprehensive body of knowledge needed to be a successful meeting professional
- Promoting industry standards, practices, and ethics
- Advancing the art and science of meeting management
- Increasing the value of Certified Meeting Professionals to their employers
- Maximizing the value received from the products and services provided by Certified Meeting Professionals

11,000+

the number of meeting professionals who hold the CMP designation.

55 COUNTRIES REPRESENTED

INFLUENCING ALL SECTORS OF THE INDUSTRY:

- Corporations and Associations
- Government Agencies
- Hotels and Hospitality
- Destination Marketing Organizations
- Conventions Centers
- Meeting Service Providers

About the CMP International Standards Updates

The CMP International Standards (CMP-IS) are the body of knowledge for the Certified Meeting Professional program and examination. The CMP-IS defines and categorizes the skills, competencies and abilities an individual needs in order to be successful in the profession.

The CMP-IS is updated every five years through a job analysis study. This multi-phased study includes:

(1) a literature review of industry publications and websites to identify new trends and practices:

(2) review of the current standards by two panels of industry subject matter experts who then make recommendations of additions and deletions to the knowledge and skills statements in the standards; and

(3) a validation survey, which is sent to all current CMPs to verify that the changes recommended by the panels are consistent with current practices in the field.

In 2015-16, the Events Industry Council conducted a job analysis study, the results of which have been incorporated into these CMP International Standards. Overall, changes to CMP-IS were minimal:

• In some cases, Skills and/or Sub Skills were deleted because they were already addressed in another domain.

• In some cases, the skill statements were modified to be more concise but their meaning remained the same.

• All "Common Knowledge" statements were eliminated. This information was redundant from one domain to the next and is not included on exam.

• Domain J: Professionalism was eliminated because these knowledge statements are included in the CMP Standards of Ethical Conduct, which all CMPs and potential CMPs are required to sign and agree to abide by.

During the job analysis study's validation survey, CMPs were asked to rate the Importance and frequency of each of the Skills and Sub Skills in the CMP International Standards (e.g., how important is this skill to your job and how frequently do you perform this skill). Based on these results, there were shifts in the percentage of items that test takers will receive for each of the domains.

DOMAIN	CURRENT CMP-IS	UPDATED CMP-IS
Strategic Planning	16%	10%
Project Management	15%	6%
Risk Management	8%	5%
Financial Management	10%	11%
Human Resources	3%	4%
Stakeholder Management	8%	4%
Meeting or Event Design	16%	34%
Site Management	12%	14%
Marketing	11%	12%
Professionalism	2%	0%

Terms found in the CMP International Standards

The following are the terms used in the CMP International Standards   (CMP-IS).

The CMP examination contains questions covering the variety of functions a meeting professional must perform based on this document.

BODY OF KNOWLEDGE:

A body of knowledge defines and categorizes the skills, competencies and abilities required by an individual in order to be successful in a profession. The CMP-IS is the body of knowledge an individual needs in order to earn and maintain their CMP certification.

TEST SPECIFICATION:

A test specification presents an outline for the makeup of examinations that test on a body of knowledge.

DOMAIN:

Each domain is a CMP-IS knowledge base area.

SKILL:

The defined task under the knowledge based domain.

SUB SKILL:

Specific functions needed to perform the skill.

☐ KNOWLEDGE OF:

Minimum level of comprehension and understanding of the sub skill.

☐ SKILL IN:

Lists specific details and understanding needed to sucessfully master the sub skill.

The 2017 CMP International Standards are comprised of:

9 Domains, 28 Skills, and 84 Sub Skills.

CMP Detailed Exam Content

Domains A, B, C, and D

9 DOMAINS	28 SKILLS	84 SUB SKILLS	Number of Exam Questions

DOMAIN A: Strategic Planning

Exam Questions in Domain A 15

Skill 1 | Create Strategic Plan for Meeting or Event

Questions in Skill 1 .... 3 - 5

   SUB SKILL 1.1 - Develop event goals and objectives to align with organizational strategy.

   SUB SKILL 1.2 - Complete needs assessment to determine feasibility of the meeting or event.

   SUB SKILL 1.3 - Identify meeting or event requirements to align with goals and objectives.

   SUB SKILL 1.4 - Complete a financial analysis and develop a financial summary.

   SUB SKILL 1.5 - Monitor and measure event benchmarks to align with the strategic plan.

Skill 2 | Develop a Sustainability Plan for Meeting or Event

Questions in Skill 2 .... 5 - 8

   SUB SKILL 2.1 - Implement Sustainability Plan.

   SUB SKILL 2.2 - Demonstrate environmental responsibility.

Skill 3 | Develop Business Continuity or Long-Term Viability Plan of Meeting or Event

Questions in Skill 3 .... 3 - 5

   SUB SKILL 3.1 - Develop evaluation plan based on event goals and objectives to align with organizational strategy.

   SUB SKILL 3.2 - Collect and analyze meeting or event data using the evaluation plan to measure return on investment.

   SUB SKILL 3.3 - Evaluate meeting or event data to measure the critical success factors against the goals and objectives.

DOMAIN B: Project Management

Exam Questions in Domain B 9

Skill 4 | Plan Meeting or Event Project

Questions in Skill 4 .... 4 - 6

   SUB SKILL 4.1 - Develop project plan based on meeting needs to align with goals and objectives.

Skill 5 | Manage Meeting or Event Project

Questions in Skill 5 .... 4 - 6

   SUB SKILL 5.1 - Manage the critical path to complete the project plan.

   SUB SKILL 5.2 - Develop and manage contract management plan to meet stakeholder expectations and meeting requirements.

   SUB SKILL 5.3 - Execute project management plan to meet goals and objectives.

DOMAIN C: Risk Management

Exam Questions in Domain C 8

Skill 6 | Manage Risk Management Plan

Questions in Skill 6 8

   SUB SKILL 6.1 - Identify risks by reviewing current data and event history to address potential risks.

   SUB SKILL 6.2 - Apply industry best practices to analyze risks.

   SUB SKILL 6.3 - Develop and manage contract management plan to meet stakeholder expectations and meeting requirements.

   SUB SKILL 6.4 - Develop and implement emergency response plan to manage resources in emergency situations.

   SUB SKILL 6.5 - Arrange security according to emergency response plan to reduce impact.

DOMAIN D: Financial Management

Exam Questions in Domain D 16

Skill 7	Manage Event Funding and Financial Resources	
SUB SKILL 7.1 – Develop budgeting processes for funding resource management to fulfill financial goals. **SUB SKILL 7.2** – Develop and manage the registration process through a defined system to reach established goals and targets.	

CMP Detailed Exam Content

Skill 7 - Continued | Manage Event Funding and Financial Resources	Questions in Skill 7 . . . . 6 - 8
SUB SKILL 7.3 - Develop and manage exhibit sales process using current year space allocation to reach established goals and targets. **SUB SKILL 7.4** - Manage additional revenue sources through research and analysis to reach established goals and targets.	
Skill 8 | Manage Budget	Questions in Skill 8 . . . . 6 - 8
SUB SKILL 8.1 - Develop budget using accepted accounting principles to align with the goals, objectives, and financial parameters of the event. **SUB SKILL 8.2** - Establish pricing (e.g., registration, sponsorships, exhibits) based on market analysis to meet financial targets and goals. **SUB SKILL 8.3** - Monitor and revise budget using established audit procedures to identify potential adjustments.	
Skill 9 | Manage Monetary Transactions	Questions in Skill 9 . . . . 1 - 3
SUB SKILL 9.1 - Establish monetary transactions procedures to comply with event or organization financial guidelines. **SUB SKILL 9.2** - Manage monetary transactions process to confirm compliance with event or organization financial guidelines.	

DOMAIN E: Human Resources	Exam Questions in Domain E 6
Skill 10 | Recruit Staff and Volunteers	Questions in Skill 10 . . . . 2 - 4
SUB SKILL 10.1 - Assess staffing needs by reviewing program activities to determine requirements and selection criteria. **SUB SKILL 10.2** - Develop a staff and volunteer recruitment plan to fulfill requirements.	
Skill 11 | Train Staff and Volunteers	Questions in Skill 11 . . . . 2 - 4
SUB SKILL 11.1 - Provide orientation and training to staff and volunteers to align with company and event goals and objectives.	

DOMAIN F: Stakeholder Management	Exam Questions in Domain F 6
Skill 12 | Manage Stakeholder Relationships	Questions in Skill 12 6
SUB SKILL 12.1 - Perform stakeholder analysis to align expectations with goals and objectives. **SUB SKILL 12.2** - Manage stakeholder activities to meet expectations. **SUB SKILL 12.3** - Communicate event goals and objectives to manage stakeholder relationships..	

DOMAIN G: Meeting or Event Design	Exam Questions in Domain G 51
Skill 13 | Develop Program	Questions in Skill 13 . . . . 12 - 14
SUB SKILL 13.1 - Develop theme for meeting or event. **SUB SKILL 13.2** - Develop procurement strategy for the acquisition of goods and services in accordance with the project plan. **SUB SKILL 13.3** - Analyze the project plan to determine the critical path. **SUB SKILL 13.4** - Develop integrated communications plan to align with goals and objectives. **SUB SKILL 13.5** - Develop evaluation procedures. **SUB SKILL 13.6** - Identify program components using a variety of data to determine that the program is inclusive. **SUB SKILL 13.7** - Define program content and delivery methods aligned with meeting goals and objectives in support of the strategic plan. **SUB SKILL 13.8** - Analyze the event outcomes according to predefined metrics to measure achievement of goals and objectives.	

Skill 14	Engage Speakers and Performers	Questions in Skill 14 . . . . 5 - 7

SUB SKILL 14.1 - Determine meeting or event requirements for speakers and performers using the event design to align with meeting or event goals and objectives.

SUB SKILL 14.2 - Define strategies and criteria for speaker and performer selection referencing the goals or objectives to fulfill the program requirements.

SUB SKILL 14.3 - Choose speakers or performers using selection criteria to achieve meeting or event objectives.

SUB SKILL 14.4 - Secure speaker and performer contracts and communicate expectations aligned to event design to achieve meeting or event objectives.

Skill 15	Coordinate Food and Beverage Services	Questions in Skill 15 . . . . .10 - 12

SUB SKILL 15.1 - Identify needs and establish guidelines for food and beverage services to meet meeting budget and objectives.

SUB SKILL 15.2 - Select food and beverage service provider(s) and menu(s) following event design and within budget.

SUB SKILL 15.3 - Use relevant rules and regulations to manage alcohol service to comply with legal, organizational, and event policies.

Skill 16	Design Environment	Questions in Skill 16 . . . . 5 - 7

SUB SKILL 16.1 - Determine event design and theme requirements based on stated objectives that meet attendee and organizational expectations.

SUB SKILL 16.2 - Select décor based on event design to support the requirements of the meeting or event.

SUB SKILL 16.3 - Coordinate meeting or event signage by following the marketing plan to meet the requirements of the meeting or event.

Skill 17	Manage Audiovisual and Technical Production	Questions in Skill 17 . . . . 4 - 6

SUB SKILL 17.1 - Identify staging and technical equipment requirements using event design to support meeting or event objectives.

SUB SKILL 17.2 - Acquire staging and technical equipment based on defined requirements to support the event design.

SUB SKILL 17.3 - Install staging and technical equipment based on defined requirements to support the event design.

SUB SKILL 17.4 - Oversee technical production and operation based on defined requirements to support the event design.

Skill 18	Develop Plan for Managing Movement of Attendees	Questions in Skill 18 . . . . 5 - 7

SUB SKILL 18.1 - Develop admittance management plan to control protocols and efficiency.

SUB SKILL 18.2 - Develop a plan for effective crowd management.

SUB SKILL 18.3 - Coordinate housing requirements and define policies in line with organizational standards.

SUB SKILL 18.4 - Coordinate transportation requirements and define policies in line with organizational standards.

SUB SKILL 18.5 - Follow established protocol guidelines by adhering to organizational and situational requirements.

DOMAIN H: Site Management	Exam Questions in Domain H 21

Skill 19	Select Site	Questions in Skill 19 . . . . 6 - 7

SUB SKILL 19.1 - Complete needs assessment using event design to determine site specifications.

SUB SKILL 19.2 - Identify and inspect sites based on event design and according to selection criteria.

Skill 20	Design Site Layout	Questions in Skill 20 . . . . 4 - 6

SUB SKILL 20.1 - Develop site maps and floorplans according to event design and requirements to achieve event goals and objectives.

Skill 21 | Manage Meeting or Event Site

Questions in Skill 21 .... **5 - 7**

SUB SKILL 21.1 – Create logistics plan for site setup, operation, and takedown using event design to achieve goals and objectives.

SUB SKILL 21.2 – Implement logistics plan during site setup to meet event design and requirements.

SUB SKILL 21.3 – Implement logistics plan during event to meet event design and requirements.

SUB SKILL 21.4 – Implement logistics plan during dismantle to meet event design and requirements.

Skill 22 | Manage On-site Communications

Questions in Skill 22 .... **3 - 5**

SUB SKILL 22.1 – Define on-site communications plan aligned with marketing plan to meet event goals and objectives.

SUB SKILL 22.2 – Determine and secure required communication equipment and resources to meet event requirements.

SUB SKILL 22.3 – Specify communication procedures and protocols for each audience based on the event requirements.

DOMAIN I: Marketing

Exam Questions in Domain I **18**

Skill 23 | Develop Marketing Plan

Questions in Skill 23 .... **2 - 4**

SUB SKILL 23.1 – Conduct a situational analysis using historical and current data to develop the marketing plan to meet goals and objectives

SUB SKILL 23.2 – Identify target market segments using the situational analysis to determine key features, products, and services.

SUB SKILL 23.3 – Select marketing distribution channels using the situational analysis that aligns with the marketing plan.

SUB SKILL 23.4 – Implement marketing plan to reach targeted segments to support the goals and objectives of the meeting or event.

Skill 24 | Create and Manage Marketing Materials

Questions in Skill 24 .... **3 - 5**

SUB SKILL 24.1 – Determine marketing materials that meet target market needs and support the goals and objectives.

SUB SKILL 24.2 – Develop marketing content and design specifications based on the marketing plan to maximize impact.

SUB SKILL 24.3 – Produce and distribute marketing materials to the target markets in alignment with the marketing plan.

Skill 25 | Create and Manage Meeting or Event Merchandise

Questions in Skill 25 .... **1 - 3**

SUB SKILL 25.1 – Determine product design and specifications using the marketing plan to support the meeting or event objectives.

Skill 26 | Promote Meeting or Event

Questions in Skill 26 .... **3 - 5**

SUB SKILL 26.1 – Develop cross-promotional activities to expand market reach aligned with the marketing plan in support of the goals and objectives.

SUB SKILL 26.2 – Develop promotions to create awareness through platforms to reach goals and objectives.

Skill 27 | Contribute to Public Relations Activities

Questions in Skill 27 .... **1 - 3**

SUB SKILL 27.1 – Develop, implement, and manage public relations strategy to align with the marketing plan.

Skill 28 | Manage Meeting-Related Sales Activities

Questions in Skill 28 .... **1 - 3**

SUB SKILL 28.1 – Reference the marketing plan and support development of the sales plan with objectives.

SUB SKILL 28.2 – Execute activities from the sales plan to meet the goals and objectives.

Table of Contents

CMP International Standards

DOMAIN A: STRATEGIC PLANNING

This domain outlines the knowledge and skills needed to manage a

strategic plan for a meeting or event, develop a sustainability plan for an event and develop a business continuity or long-term viability plan for a meeting or event. This domain sets the direction for all decisions about event management.

Skill 1 | Create Strategic Plan for Meeting or Event

☐ SUB SKILL 1.1 – Develop event goals and objectives to align with organizational strategy.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Working with stakeholders, create goal statements to specify how meeting or event will achieve its mission.

b. Working with stakeholders, establish objectives to specify actions, time frames, and performance measurements needed to achieve goals.

c. Working with stakeholders, align mission statement, goals, and objectives of meeting or event and organization/stakeholders.

d. Working with stakeholders, identify and manage diversity and cross-cultural concerns (e.g., holidays, group preferences, accessibility compliance).

e. Working with stakeholders, determine sustainability objectives (e.g., financial, environmental, social).

f. Working with stakeholders, identify financial resources that may be available.

g. Working with stakeholders, determine target date(s) and markets.

☐ SUB SKILL 1.2 – Complete needs assessment to determine feasibility of the meeting or event.

☐ KNOWLEDGE OF:

a. Research methods suitable to ascertain viability of meeting or event

b. Legal and regulatory requirements

☐ SKILL IN:

a. Determining short-, medium-, and long-term economic and social impacts on host community (e.g., focus on impact of limited events).

b. Developing evaluation process to capture information about potential attendees, costs and benefits, and financial resources

SUB SKILL 1.3 – Identify meeting or event requirements to align with goals and objectives.

KNOWLEDGE OF:

a. Tools or resources available for meeting or event planning (e.g., technology)

SKILL IN:

a. Identifying requirements based on scope of meeting or event, including planning cycle, sponsorship opportunities, additional sources of resources, meeting or event evaluation, administrative needs, leadership and management, logistics and operations structure, cross-cultural needs, marketing, human resources (e.g., number of people, wage rates), meeting or event timing, location and size, data flow, public relations, systems to track progress.

SUB SKILL 1.4 – Complete a financial analysis and develop a financial summary.

KNOWLEDGE OF:

a. Tools or resources for financial planning

b. World monetary situations

SKILL IN:

a. Compiling financial information using financial results, current financial position, sources and applications for funding, and current balance sheet details (e.g., assets, liabilities, equity, statement of operational costs, cash flow statements, projected closing balance sheets, break-even analysis, projected return on investment, applicable taxes or levies into a complete financial report).

SUB SKILL 1.5 – Monitor and measure event benchmarks to align with the strategic plan.

KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

SKILL IN:

a. Comparing meeting or event progress to mission statement, goals, and objectives.

b. Monitoring cash flow to determine financial standing to date.

c. Managing financial resources.

d. Analyzing all data available when evaluating a need for change.

e. Recording change control details (e.g., date, rationale, implementation plan to support the need for change to event so that support is obtained for changes made).

Skill 2 | Develop a Sustainability Plan for Meeting or Event

☐ SUB SKILL 2.1 – Implement a sustainability plan.

☐ KNOWLEDGE OF:

a. Sustainability standards for meeting or event (e.g., ISO 20121, BS8901, APEX/ASTM standards; Global Reporting Initiative (GRI)

☐ SKILL IN:

a. Considering potential short- and long-term social and environmental impact of meeting or event.

☐ SUB SKILL 2.2 – Demonstrate environmental responsibility.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

b. Implementing conservation practices (e.g., using recyclable products, reducing energy use and water consumptions, minimizing noise and light pollution).

c. Selecting strategies to create positive outcomes and mitigate negative impacts of meeting or event on community.

☐ SKILL IN:

a. Considering potential short- and long-term social and environmental impact of meeting or event.

Skill 3 | Develop Business Continuity or Long-Term Viability Plan of Meeting or Event

☐ **SUB SKILL 3.1** – Develop evaluation plan based on event goals and objectives to align with organizational strategy.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Defining return on investment objectives/ expected outcomes (e.g., efficiency, effectiveness, accountability, justifying investments).

b. Determining what data will be collected (e.g., costs, post-event attendee feedback).

c. Developing a business case for long-term sustainability.

☐ **SUB SKILL 3.2** – Collect and analyze meeting or event data using the evaluation plan to measure return on investment.

☐ **KNOWLEDGE OF:**

a. Quantitative and qualitative data.

☐ **SKILL IN:**

a. Collecting data (e.g., evaluation-related, attendance, financial).

b. Analyzing data..

c. Preparing and reporting data.

☐ **SUB SKILL 3.3** – Evaluate meeting or event data to measure the critical success factors against the goals and objectives.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Reviewing critical success factors for meeting or event (e.g., benchmarks).

b. Implementing evaluation/audit procedures as scheduled (e.g., collecting and analyzing information, verifying validity and reliability of information, identifying and reporting any difficulties accessing information, identifying and addressing irregularities).

c. Evaluating information (e.g., identifying reasons for success/failure and key lessons for future meetings or events).

d. Developing reports (e.g., detailing information used and information sources, explaining how information has been analyzed, drawing conclusions and making recommendations based on evidence, using best format for organization, key personnel, and stakeholders).

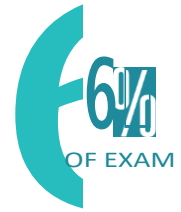e. Following integrated communication plan for distribution of evaluation/audit report and confidentiality guidelines.

f. Debriefing internal and external stakeholders.

DOMAIN B: PROJECT MANAGEMENT

When planning an event, the event professional is undertaking the management of

a project from beginning to end including logistics, budgets, resource deployment and schedule management. This domain draws from best practices from the project management field and applies and adapts them to event management.

Exam Questions in Domain B 9
Questions in Skill 4 . . . . 4 - 6

Skill 4 | Plan Meeting or Event Project

☐ SUB SKILL 4.1 - Develop project plan based on meeting needs to align with goals and objectives.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Reviewing available historical data (e.g., previous project plans) in order to identify strengths and weaknesses, review goals and objectives, and compare results to goals and objectives.

b. Specifying the actions, time frames, and performance measurements needed to achieve objectives.

c. Identifying resources required and available (e.g., financial, material, staff).

d. Engaging relevant stakeholders in planning process (e.g., including attendees, conducting exploratory research, seeking peer reviews).

Skill 5 | Manage Meeting or Event Project

☐ SUB SKILL 5.1 - Manage the critical path to complete the project plan.

☐ KNOWLEDGE OF:

a. Critical paths and review schedules

☐ SKILL IN:

a. Identifying specific tasks and projects required to achieve mission, goals, and objectives of meeting or event.

b. Prioritizing tasks and projects.

c. Determining timelines and critical dates.

d. Creating meeting or event briefs outlining relevant information for specific stakeholders (e.g., committee members, suppliers, agencies, project team).

e. Assigning tasks to specific groups or individuals based on skills or areas of expertise.

f. Scheduling regular review of critical path (e.g., assessing variations between estimated and actual time, analyzing resource deficiencies and overages).

g. Taking corrective action based on results of review.

h. Keeping key personnel informed of progress and changes.

DOMAIN B: PROJECT MANAGEMENT

☐ **SUB SKILL 5.2** - Develop and manage contract management plan to meet stakeholder expectations and meeting requirements.

☐ **KNOWLEDGE OF:**

a. Principles of negotiation, stages of negotiating process, and negotiation techniques

b. Components of legal contracts

c. Meeting or event and organization's requirement

☐ **SKILL IN:**

a. Identifying requirements for contracts (e.g., preparing specifications).

b. Communicating request for proposal (RFP) processes to potential suppliers of goods and services.

c. Evaluating proposals against criteria.

d. Negotiating contracts (e.g., striving for beneficial outcomes for all parties involved, determining what is negotiable and non-negotiable, explaining organization's position and viewpoint, listening to and validating other parties' positions and viewpoints, discussing options, agreeing on most viable options, deciding on sources of information for evaluation).

e. Consulting legal opinion, if needed.

f. Integrating contractual obligations into meeting or event's critical path.

g. Maintaining productive relationship with contractors (e.g., monitoring progress on a regular basis to determine that the organization and contractors are fulfilling obligations, agreeing on action to rectify non-compliance, dealing with breaches of contract within acceptable time frame).

h. Assessing contractors' performance to identify strengths and weaknesses.

i. Monitoring contractors' expenditures against contract.

j. Comparing organization's performance against contract

☐ **SUB SKILL 5.3** - Execute project management plan to meet goals and objectives.

☐ **KNOWLEDGE OF:**

a. Critical paths and review schedules

b. On-site resources and personnel

c. On-site meeting or event management

d. Integrated communication plans

☐ **SKILL IN:**

a. Following event specifications guide for meeting or event.

b. Maintaining flow/sequence of activities during meeting or event.

c. Determining that all resources, personnel, and supports are in place and ready.

d. Ensuring that all personnel are briefed (e.g., submitting event specifications guide to key stakeholders, as appropriate).

e. Providing authorizations for elements of meeting or event to take place.

f. Receiving and distributing funding.

g. Overseeing the work of key personnel and other stakeholders throughout meeting or event (e.g., following integrated communications plan).

h. Implementing risk management techniques and strategies to minimize disruption to participants and to deal with problems that arise.

i. Keeping key personnel informed of progress and changes.

j. Maintaining records.

DOMAIN C: RISK MANAGEMENT
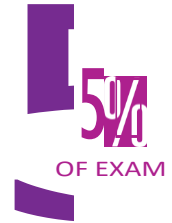
Risk management, as applied to the events industry, is the ongoing process

of assessing the risks that may threaten attendees, the meeting or event itself, or stakeholders and applying the appropriate measures to manage the probability and consequences of such risks. This domain focuses on managing serious risks that may threaten life, health, property or the financial viability of a meeting, business or organization.

> Exam Questions in Domain C 8
> Questions in Skill 6 8

Skill 6 | Manage Risk Management Plan

☐ SUB SKILL 6.1 - Identify risks by reviewing current data and event history to address potential risks.

☐ KNOWLEDGE OF:

a. Research methods

b. Risk management

☐ SKILL IN:

a. Reviewing meeting or event plan (e.g., type of meeting or event, location of meeting or event, time of year, time of day, duration of meeting or event, profile of attendees, number of attendees).

b. Reviewing any investigations of previous incidents.

c. Determining scope and nature of legal, ethical, and regulatory obligations: considering range of legal and regulatory issues (e.g., contracts); determining jurisdictions responsible (e.g., national and local governments); identifying legislation, codes, ordinances, mandates, and regulations applicable to meeting or event and its operations; identifying authorities, agencies, or governing bodies responsible; determining process for acquiring authorizations.

d. Consulting with other relevant individuals (e.g., colleagues, clients, contractors, performers, legal personnel, security personnel, venues).

e. Evaluating venue and geographic location for potential hazards, threats, vulnerabilities, or other risks.

f. Assessing the need for specialist advice or assistance in addressing legal, regulatory, and jurisdictional requirements.

g. Conducting risk assessment.

☐ SUB SKILL 6.2 - Apply industry best practices to analyze risks.

☐ KNOWLEDGE OF:

a. Authorities, agencies, and governing bodies that preside over specific activities within a jurisdiction

☐ SKILL IN:

a. Determining what is exposed to damage, loss, or liability (e.g., property, persons, cash, reputation, environment); what could cause damage, loss, or liability; who could suffer damage, loss, or liability; and when damage, loss, or liability might occur.

b. Assessing probability of occurrence, severity of consequences (e.g., extent of impact, financial consequences, maximum possible loss or liability).

c. Prioritizing risks, considering organization's tolerance for risk and jurisdiction's mandates regarding risk, and mitigating or transferring risk.

d. Considering effectiveness of risk management techniques.

☐ SUB SKILL 6.3 - Develop and manage contract management plan to meet stakeholder expectations and meeting requirements.

☐ KNOWLEDGE OF:

a. Organizational culture

b. Location situational analysis

☐ SKILL IN:

a. Evaluating options to meet legal requirements and mitigate risks (e.g., seeking advice from regulatory authorities and specialists, putting supports in place to minimize risks).

b. Identifying health and safety requirements and selecting available options to meet requirements.

c. Preparing risk management plan, including chain of command, emergency and control procedures, spokesperson, and implementation strategies (e.g., decision-making authority, resource requirements, coordination requirements).

d. Implementing plan to manage risks.

e. Communicating plan and procedures to emergency services, media, suppliers, senior management, and staff.

f. Assessing risk management plan on an ongoing basis.

g. Complying with regulations.

h. Consulting experts.

i. Obtaining insurance, reviewing insurance coverage needs and levels periodically, and updating insurance coverage as needed.

☐ SUB SKILL 6.4 - Develop and implement emergency response plan to manage resources in emergency situations.

☐ KNOWLEDGE OF:

a. Decision-making authority processes

☐ SKILL IN:

a. Conducting a threat assessment to identify potential threats, hazards, or emergencies (e.g., earthquake, disease outbreak, hazardous material spill, utility failure, bomb threat, structure collapse).

b. Performing a capability assessment to determine resources available to respond to an emergency (e.g., medical, fire, rescue, security).

c. Conferring with authorities to determine requirements and appropriate emergency procedures, including access, egress, and locations for emergency services; exit route configuration for site evacuation; on-site medical services required (e.g., number and locations of first-aid stations and emergency medical technicians); internal and external communication systems; roles; responsibilities; lines of authority; and delegation of duties.

d. Implementing emergency response plans and communication procedures.

e. Executing contingency and business continuity plans as appropriate.

☐ SUB SKILL 6.5 – Arrange security according to emergency response plan to reduce impact.

☐ KNOWLEDGE OF:

a. Risk analysis

b. Types of security alternatives

☐ SKILL IN:

a. Determining needs, including considering type of meeting or event, hours of operation, type of venue, types of activities (e.g., serving alcohol), physical activities, number and nature of attendees and VIPs, number and nature of entrances and exits, traffic patterns, insurance requirements, and type of property issues (e.g., theft).

b. Complying with applicable jurisdictions.

c. Informing authorities (e.g., fire, police) of meeting or event time, dates, and activities.

d. Arranging for security staff and facilities, training for staff and volunteers, and accreditation for security staff.

e. Attaining certificates of insurance from security suppliers (e.g., obtaining additional coverage), as needed.

f. Detailing security procedures for emergency situations (e.g., crowd control, protesters and/or picket lines, site evacuation, natural disaster, terrorist activities).

g. Implementing internal and external security communication systems.

h. Establishing system for reporting and recording incidents.

DOMAIN D: FINANCIAL MANAGEMENT
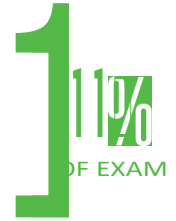
This domain covers the critical skills needed for the financial success of a

meeting or event. These include managing event funding and reserves, managing the budget and managing monetary transactions. The domain also includes identifying and managing sponsorship programs, grants, registration processes, exhibit sales and other miscellaneous revenue sources.

> Exam Questions in Domain D **16**
> Questions in Skill 7 . . . . **6 - 8**

Skill 7 | Manage Event Funding and Financial Resources

☐ **SUB SKILL 7.1** - Develop budgeting processes for funding resource management to fulfill financial goals.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Establishing sponsorship programs: identifying financial or in-kind values, defining benefits, and estimating costs for providing benefits.

b. Obtaining support of key stakeholders for proposed sponsorship arrangement.

c. Seeking legal opinion, as needed.

d. Identifying potential sponsors and donors, considering: compatibility with meeting or event, exclusivity, income or cost-avoidance goals, and advertising and budget limitations (to find sponsors).

e. Producing sponsor and donor benefit packages or proposals containing overview and history of meeting or event, corporate identity to be presented (e.g., use of logos), value for sponsorship, letter of proposal, audience demographics, return-on-investment measures and opportunities, sponsorship benefits and limitations, and pre-event/meeting sponsorship restrictions.

f. Distributing sponsor and donor benefit packages and proposals to potential sponsors.

g. Contacting potential sponsors and donors (e.g., primary decision-maker or person of influence), determining type of support available (e.g., cash, discounts, products), establishing relationships with sponsors' creative agencies, negotiating sponsor commitment (e.g., distribution, product sales), and conducting set-up, tear-down, and sampling.

h. Considering how sponsors may complement or conflict with each other.

i. Preparing contracts for committed sponsors, outlining: details of meeting or event, responsibilities of both parties (e.g., liabilities), personnel, entertainment, financial obligations, release forms and waivers, policy regarding meeting or event cancellation, and insurance requirements.

j. Maintaining relationships with sponsors and donors (e.g., providing regular updates).

k. Managing contractual fulfillment and developing fulfillment reports (e.g., delivery of benefits).

l. Following up (e.g., evaluating sponsor and donor involvement, evaluating return on investment from sponsors' points of view).

m. Coordinating approach for soliciting potential donors and sponsors.

☐ SUB SKILL 7.2 – Develop and manage the registration process through a defined system to reach established goals and   targets.

☐ KNOWLEDGE OF:

a. Setting financial targets for registration

b. Previous registration lists for meeting or event

c. Registration systems (e.g., internal/external)

☐ SKILL IN:

a. Identifying potential attendees and types of attendees.

b. Communicating attendee benefits in pre-registration information packet containing:

overview and history of meeting or event, location of and cost to attend meeting or event, identity of meeting or event sponsor, educational value of attending, meeting or event agenda, criteria for acceptance of registration (if applicable), and additional programming offerings (e.g., tours, spouse programming, hospitality).

c. Identifying potential supplier partners (e.g., application service provider, full-service registration contractor).

☐ SUB SKILL 7.3 – Develop and manage exhibit sales process using current year space allocation to reach established goals and   targets.

☐ KNOWLEDGE OF:

a. Exhibit sales goals/targets including on-site and post-meeting or event deliverables

b. Protocols (e.g., methods of communication)

c. Security and safety regulations, restrictions, and constraints (e.g., facility, organization, government)

d. Public relations and marketing plans

☐ SKILL IN:

a. Establishing exhibit rates.

b. Identifying potential exhibitors considering compatibility with meeting or event.

c. Producing exhibitor benefit packages (prospectus) containing: overview and history of meeting or event, value for participation, letter of solicitation, audience demographics, ROI measures and opportunities, and pre- and post-event/meeting activity restrictions.

d. Distributing benefit packages to potential exhibitors.

e. Completing contract negotiations with exhibitors.

f. Establishing positive relations with exhibitors (e.g., recognition program, feedback from exhibitors).

☐ SUB SKILL 7.4 – Manage additional revenue sources through research and analysis to reach established goals and targets.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Purchasing advertising

b. Merchandising

c. Negotiating and setting commission rates.

d. Determining and setting royalty rates.

Skill 8 | Manage budget

☐ **SUB SKILL 8.1** - Develop budget using accepted accounting principles to align with the goals, objectives, and financial parameters of the event.

☐ **KNOWLEDGE OF:**

a. Scope of meeting or event

b. Meeting or event objectives

c. Type of insurance

d. Organization's cash flow

e. Fluctuations in currency and taxes.

☐ **SKILL IN:**

a. Defining budget format and categories.

b. Identifying, accessing, and interpreting data and data sources needed for budget preparation (e.g., previous budgets, audits).

c. Analyzing internal and external factors for potential impacts on budget (e.g., new legislation, market trends).

d. Determining potential sources of revenue, including grants, sponsorships, sales (e.g., ticket sales, souvenirs), registration, advertising, and exhibitor fees.

e. Allocating budget amounts for meeting or event activities (direct/indirect costs), including programming, production, marketing, administration, human resources (e.g., volunteers, staff), transportation, food and beverage, accommodations, shipping costs, insurance, taxes, and gratuities.

f. Establishing contingency plan and funds.

g. Using existing chart of accounts by breaking down into weekly or monthly budgets or detailing projected cash flow.

h. Specifying fixed and variable costs.

i. Complying with budget control guidelines (e.g., payment policies and procedures), cost controls, and deposit policies and procedures for cash, credit cards, and payments.

j. Scheduling regular budget reviews.

k. Submitting budget for approval, if necessary, to senior management, partners, or organization, and revising budget as required.

l. Communicating budget decisions to those affected.

☐ **SUB SKILL 8.2** – Establish pricing (e.g., registration, sponsorships, exhibits) based on market analysis to meet financial targets and goals.

☐ **KNOWLEDGE OF:**

a. Profit requirements and desired profit margin

b. Cost of sales

c. Customer profiles

d. Annual consumer price index trends

e. Currency and credit card procedures for multinational meetings or events

f. Credit card handling costs

g. Currency fluctuations

h. Tax structures in host location

i. Perceived market value of products and services

☐ **SKILL IN:**

a. Collecting and analyzing information related to current market conditions.

b. Calculating fixed and variable costs.

c. Establishing pricing structure (e.g., percentage increase or cost plus, member discount rates).

☐ SUB SKILL 8.3 – Monitor and revise budget using established audit procedures to identify potential adjustments.

☐ KNOWLEDGE OF:

a. Reporting and audit procedures

b. Performance indicators

☐ SKILL IN:

a. Adhering to budget control guidelines and responding to variances.

b. Monitoring revenues and expenses within established time frames.

c. Comparing budgeted amounts to actual amounts.

d. Identifying variances between budgeted and actual figures, including: determining cause(s), identifying impacts, and responding accordingly (e.g., revising activities, reallocating funds, communicating information and decisions to those affected).

e. Defining opportunities for improved budget performance: proactively researching new suppliers and revenue streams, discussing desired budgetary outcomes with colleagues, and presenting recommendations to appropriate individuals or departments.

f. Obtaining approval for amended budget.

g. Pursuing ideas for increasing income or reducing expenditures.

h. Communicating budget performance to key personnel.

i. Completing financial reports and delivering to stakeholders.

Skill 9 | Manage Monetary Transactions

☐ SUB SKILL 9.1 – Establish monetary transactions procedures to comply with event or organization financial guidelines.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Communicating policies and procedures to staff and volunteers.

b. Coordinating monetary transactions, including: setting up central cash office, establishing record-keeping systems (e.g., receipts), setting up cash collection and deposit systems, arranging for security and audit systems, processing credit cards.

☐ SUB SKILL 9.2 – Manage monetary transactions process to confirm compliance with event or organization financial guidelines.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Reviewing security procedures

b. Monitoring revenues and expenses

c. Monitoring cash handling procedures

d. Monitoring audit documentation

e. Revising procedures as needed

DOMAIN E: HUMAN RESOURCES

The event professional's role has expanded and now includes aspects of

human resource management. This may involve recruiting and training staff and volunteers, as well as managing workforce relations. This domain includes managing major human resource functions such as developing selection criteria, selecting candidates, offering positions, providing orientation and training, supervising staff and volunteers and managing teams.

Exam Questions in Domain E 6
Questions in Skill 10 .... **2 - 4**

Skill 10 | Recruit Staff and Volunteers

SUB SKILL 10.1 – Assess staffing needs by reviewing program activities to determine requirements and selection criteria.

KNOWLEDGE OF:

a. Local employment conditions

b. Local labor laws

c. Skill sets required for specific positions

d. Local terms and conditions applied to volunteers, where applicable

SKILL IN:

a. Seeking input from current staff about duties and responsibilities.

a. Reviewing documentation (e.g., organizational chart).

b. Documenting job requirements, (e.g., job title, summary of duties, required qualifications and skill sets, level of responsibility, authority and accountability, wages and/or benefits, days/hours of work or time commitment required, grooming and dress codes, option for job to be conducted outside of office or "virtually").

SUB SKILL 10.2 – Develop a staff and volunteer recruitment plan to fulfill requirements.

KNOWLEDGE OF:

a. Costs associated with recruitment

b. Budget restrictions

c. Sources for staff and volunteers

d. Background checks

SKILL IN:

a. Determining best methods for recruiting target group (e.g., promoting opportunities through local media, promoting within organization, seeking referrals through networking, participating in work education programs, reviewing applications, contacting or hiring employment agency).

b. Ensuring that process is fair, consistent, and effective.

c. Ensuring that recruitment information is clear and accurate.

DOMAIN E: HUMAN RESOURCES

Skill 11 | Train Staff and Volunteers

☐ **SUB SKILL 11.1** – Provide orientation and training to staff and volunteers to align with company and event goals and objectives.

☐ **KNOWLEDGE OF:**

a. Orientation and training procedures

b. Company expectations and guidelines

☐ **SKILL IN:**

a. Providing training and orientation to staff.

b. Communicating expectations and guidelines to staff.

DOMAIN F: STAKEHOLDER MANAGEMENT

All organizations affect, and are affected by, the environment within which

they operate and the people within that environment. In the case of events, this includes various stakeholders including attendees, workers, suppliers, and the broader community. This domain provides best practices for managing stakeholder relationships including identifying, assessing and categorizing internal and external stakeholders, managing stakeholder activities and communications. The domain also includes stakeholder communication, recognition, conflict resolution and legal considerations.

> Exam Questions in Domain F 6
> Questions in Skill 12 6

Skill 12 | Manage Stakeholder Relationships

☐ SUB SKILL 12.1 - Perform stakeholder analysis to align expectations with goals and objectives.

☐ KNOWLEDGE OF:

a. Mission statement, goals, and objectives of meeting or event and organization

b. Meeting or event details (e.g., features, critical path)

c. Appropriate protocols and local customs (e.g., dress code, VIP treatment)

☐ SKILL IN:

a. Identifying internal and external stakeholders (e.g., clients, officials, sponsors, participants, providers, exhibitors).

b. Defining stakeholder interest, issues, and priorities.

c. Determining opportunities and challenges that each stakeholder presents.

☐ SUB SKILL 12.2 - Manage stakeholder activities to meet expectations.

☐ KNOWLEDGE OF:

a. Applicable legislation (e.g., liquor laws, professional codes)

b. Appropriate protocols and local customs (e.g., dress code, VIP treatment)

☐ SKILL IN:

a. Recognizing and integrating varied interests and goals of stakeholders.

b. Determining activities that meet the needs of stakeholders.

c. Acknowledging and monitoring stakeholder concerns and capabilities.

d. Following appropriate protocols when communicating with stakeholders.

e. Communicating appropriate protocols to stakeholders.

f. Developing schedule of activities.

g. Establishing relationships with all stakeholders

DOMAIN F: STAKEHOLDER MANAGEMENT

☐ SUB SKILL 12.3 – Communicate event goals and objectives to manage stakeholder relationships.

☐ KNOWLEDGE OF:

a. Codes of practice and ethics including customer and consumer rights
b. Legal and regulatory requirements
c. Stakeholder satisfaction survey methods

☐ SKILL IN:

a. Determining that staff and volunteers know stakeholder expectations.
b. Making sure staff know their own roles and responsibilities for meeting stakeholder expectations.
c. Empowering staff and volunteers to deliver good stakeholder service.
d. Confirming that clear and effective conflict resolution processes are in place.
e. Communicating acceptable day-to-day behavior that matches organization's values.
f. Recognizing contribution of staff who work with stakeholders.
g. Establishing system to evaluate/monitor stakeholder satisfaction and improve service.

DOMAIN G: MEETING OR EVENT DESIGN
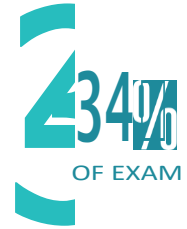
Domain G is the largest of the nine domains and encompasses a range of skill

areas needed to create a memorable meeting or event. It includes developing the theme of the program, soliciting for content abstracts, engaging speakers and performers, and setting the structure and sequence of the event. The domain also includes the skills needed to select the event's décor, signage and technical equipment, overseeing the staging and production of the meeting, crowd management, housing requirements and transportation options.

> Exam Questions in Domain G 51
> Questions in Skill 13 . . . . **12 - 14**

Skill 13 | Develop Program

☐ SUB SKILL 13.1 – Develop theme for meeting or event.

☐ KNOWLEDGE OF:

a. Range of creative, promotional, technical, and operational options

b. Key stakeholders

c. Budget parameters

d. Target market(s)

e. Marketing and public relations options

f. Destination branding and brand management

g. Program objectives

h. Cross-cultural elements

☐ SKILL IN:

a. Determining stakeholder expectations (e.g., researching target market(s), analyzing post-event reports, researching attendee expectations).

b. Generating ideas (e.g., brainstorming, networking).

c. Conceiving a meeting or event theme that will complement or integrate with organization's marketing and brand strategy.

d. Engaging expertise (e.g., marketing firm consultant).

e. Conceptualizing themes, including: identifying core concepts, topics, or messages; creating appealing images (e.g., logo); identifying means to integrate themes into all aspects of meeting or event; involving stakeholders (e.g., considering requirements of sponsors, considering cultural environment and norms); and identifying destination attributes.

f. Integrating branding and theme imagery into aspects of meeting or event experiences.

☐ SUB SKILL 13.2 – Develop procurement strategy for the acquisition of goods and services in accordance with the project plan.

☐ KNOWLEDGE OF:

a. How to conduct a cost/benefit analysis

b. Request-for-proposal process

c. Organizational strategies and policies

☐ SKILL IN:

a. Evaluating past patterns of resource use, trends, and developments.

b. Identifying need for supplementary products and services, including required range (types of services) and quantity.

c. Researching options available to meet needs that

minimize risk.

d. Assessing costs and benefits for options available.

e. Selecting best options/strategies (e.g., purchasing or renting equipment, issuing a request for proposals for services).

f. Adjusting activities if products/services are not available.

g. Recording best options/strategies and financial information.

h. Evaluating and determining best method for securing services (e.g., housing, accommodations, transportation, audiovisual).

SUB SKILL 13.3 – Analyze the project plan to determine the critical path.

KNOWLEDGE OF:

a. Tasks and phases (stages) required for meeting or event (e.g., pre-, during, post-)

b. Interdependence of tasks and phases (stages)

c. Schedule development and revision

d. Project planning and management

c. Determining links, dependencies, timelines, and critical dates.

d. Estimating durations of tasks.

e. Assigning tasks to specific committees or individuals.

f. Scheduling regular review of critical path.

g. Identifying potential risks.

h. Managing critical paths.

SKILL IN:

a. Identifying specific, realistic, measurable, and achievable tasks and phases required to achieve meeting or event objectives.

b. Setting and prioritizing goals and objectives.

SUB SKILL 13.4 – Develop integrated communications plan to align with goals and objectives.

KNOWLEDGE OF:

a. Applicable legislation, regulations, customs, and internal policies concerning communication issues (e.g., intellectual rights, privacy, proprietary information, cultural/political)

b. Organizational structure

c. Strategic plan and goals

d. Differences (e.g., priorities, views) of respective stakeholders (e.g., intradepartmental, project team, external, individuals with special needs or language differences)

e. Marketing, public relations, and communications plan

f. Policies related to system security

SKILL IN:

a. Designing meeting or event communication plan that will complement or integrate with organization's communication plan, internal organization's plan, and external stakeholders' plan.

b. Establishing standardized documentation and document design procedures.

c. Using information retrieval systems.

d. Creating information collection policies, procedures, and structures.

e. Constructing information distribution policies, procedures, and structures (e.g., who gets the information).

f. Generating policies and procedures to maintain system security and integrity (e.g., developing privacy policy, developing accessibility policy).

g. Setting up data reporting and monitoring systems.

h. Establishing record-keeping and filing systems.

i. Developing information preservation and archiving policies and procedures.

j. Creating plan for site communication (e.g., tools to be used for site communication, protocols, emergency contacts, risk management plan, on-site logistics).

k. Researching and selecting technology for site communication.

l. Analyzing and selecting different technologies for storage (e.g., database, paper filing system).

☐ SUB SKILL 13.5 – Develop evaluation procedures.

☐ KNOWLEDGE OF:

a. Evaluation processes and procedures

b. Basic accounting principles that are global in nature

c. How to set measurable objectives

d. Meeting-or-event-related elements or activities that may be evaluated/audited before, during, and after meeting or event

e. Stakeholder requirements

☐ SKILL IN:

a. Defining purpose of evaluation.

b. Identifying areas to be evaluated (e.g., mission, goals, program, sponsorship program, attendance, finances).

c. Determining critical success factors for meeting or event (e.g., benchmarks).

d. Identifying evaluation/audit procedures, including: determining who will conduct evaluation/audit and identifying information required for evaluation (e.g., plans, budgets, variance reports, progress reports).

e. Selecting date(s) for implement

f. Establishing reporting process.

☐ SUB SKILL 13.6 – Identify program components using a variety of data to determine that the program is inclusive.

☐ KNOWLEDGE OF:

a. Potential program components (e.g., activities, food and beverages, décor and design, educational sessions, speakers)

b. Structure and sequence of program components

c. Sources of human, physical, and financial resources

d. Meeting or event objectives

e. Attendee profile

f. Previous program evaluation results/reports

☐ SKILL IN:

a. Analyzing previous year's program and evaluation report, if applicable.

b. Incorporating meeting or event objectives, and education and learning principles.

c. Researching new ideas, including: reviewing programs of other similar meetings or events, surveying target market(s), determining attendee expectations (e.g., conducting brainstorming and other idea-generating exercises), and identifying opportunities for innovation.

d. Identifying desired program components (e.g., speakers, entertainment, attractions, activities, ancillary programs).

e. Determining that desired components meet legal and regulatory requirements.

f. Generating cost estimates and discussing details with stakeholders and colleagues.

g. Gaining stakeholder support for program components..

☐ **SUB SKILL 13.7** – Define program content and delivery methods aligned with meeting goals and objectives in support of the strategic plan.

☐ **KNOWLEDGE OF:**

a. Education and learning principles

b. Theme of meeting or event

c. Projected attendance

d. Legal requirements

e. Participation patterns

f. Contract requirements

g. Time frame, meeting, or event critical path

h. Site design

i. Communication plan

☐ **SKILL IN:**

a. Identifying options, (e.g., sending out requests for proposals/bids, contacting agents and speakers' bureaus, identifying key personnel), communicating meeting or event needs with speakers and entertainers.

b. Matching program format and outcomes to stakeholder objectives.

c. Selecting options that meet needs and constraints (e.g., legal, site, budget, educational goals).

d. Aligning program components and marketing strategies to meeting or event objectives.

e. Securing program components: approving conditions/expectations/deliverables, agreeing on provision of program component requirements (e.g., technical needs).

f. Determining requirements for each program component (e.g., production times, location, personnel, setup requirements).

g. Presenting program content and delivery formats to stakeholders for input and approval, as necessary.

h. Allocating required resources.

i. Identifying contiguous and concurrent program components.

j. Implementing protocols for ceremonial/religious/political components.

k. Incorporating marketing activity requirements (e.g., contest winners, competitions, announcements).

l. Compiling program agenda.

m. Assigning roles to staff and volunteers within their skill sets.

n. Developing contingency plan for program components.

o. Creating required documents, including script, detailed agenda, and production schedule.

☐ **SUB SKILL 13.8** – Analyze the event outcomes according to predefined metrics to measure achievement of goals and objectives.

☐ **KNOWLEDGE OF:**

a. Return on investment (ROI)

b. Return on objective (ROO)

c. Approaches to evaluation

☐ **SKILL IN:**

a. Conducting ongoing measurement of the event against the objectives.

b. Developing benchmarks.

c. Creating tools for measuring success (e.g., surveys).

Skill 14 | Engage Speakers and Performers

☐ **SUB SKILL 14.1** - Determine meeting or event requirements for speakers and performers using the event design to align with meeting or event goals and objectives.

☐ **KNOWLEDGE OF:**

a. Times, locations, or activities that require speakers and performers

b. Requirements for performers

c. Types of available speakers and performers (e.g., musicians, presenters)

☐ **SKILL IN:**

a. Identifying types of speakers or performers to meet goals and objectives.

b. Selecting speakers and performers (e.g., using speaker bureaus, agents, directories).

☐ **SUB SKILL 14.2** - Define strategies and criteria for speaker and performer selection referencing the goals or objectives to fulfill the program requirements.

☐ **KNOWLEDGE OF:**

a. Audience demographics, political environment, and culture

b. Type of program required

c. Proposed time, duration, and location

☐ **SKILL IN:**

a. Seeking input on selection criteria.

☐ **SUB SKILL 14.3** - Choose speakers or performers using selection criteria to achieve meeting or event objectives.

☐ **KNOWLEDGE OF:**

a. Meeting and event objectives

☐ **SKILL IN:**

a. Researching candidates' performance

(e.g., live selection or recorded).

b. Recording comments and ratings based on selection criteria.

c. Selecting performers or speakers.

☐ **SUB SKILL 14.4** - Secure speaker and performer contracts and communicate expectations aligned to event design to achieve meeting or event objectives.

☐ **KNOWLEDGE OF:**

a. Principles of negotiation

b. Components of legal contracts

c. Meeting or event requirements

☐ **SKILL IN:**

a. Negotiating contracts.

b. Monitoring contracts to determine that obligations

are fulfilled.

c. Conducting ongoing communication with speakers

and performers, including expectations of both parties, attendee expectations, goals of meeting, logistics, attendee profile, performance limitations (e.g., dress code), and cultural information.

d. Integrating contractual obligations into meeting or event's critical path.

e. Following up on issues (e.g., agreeing on action to rectify non-compliance, dealing with breaches of contract within acceptable time frame).

f. Evaluating performer or speaker performances to identify strengths and weaknesses.

Skill 15 | Coordinate Food and Beverage Services

☐ SUB SKILL 15.1 – Identify needs and establish guidelines for food and beverage services to meet meeting budget and objectives.

☐ KNOWLEDGE OF:

a. Operational constraints due to venue, site, or climatic conditions

b. Dietary preferences, restrictions and cultural protocols

c. Principles and legal requirements of food safety

d. Attendee profiles

e. Program schedule

☐ SKILL IN:

a. Identifying considerations (e.g., theme, sponsors, licensing requirements, attendee profiles, trends).

b. Developing guidelines for acquiring products and services (e.g., tendering, direct purchase), establishing controls (e.g., quality, security), and establishing methods of distribution (e.g., paid or complimentary).

c. Complying with applicable jurisdictions (e.g., liquor, public health).

d. Confirming date, time, and location of food and beverage services.

e. Performing quantity calculations.

f. Determining supplies and equipment required (e.g., dishes, cutlery, glasses, tables, table linens, ice, tickets).

g. Arranging for equipment to be set up and operational; supplies to be delivered and available; delivery; storage; returns and recycling of bottles; security for cash, alcohol, and tickets; and staff training in responsible beverage service.

h. Scheduling staff (e.g., determining number of staff required, identifying tasks to be completed post schedule).

☐ SUB SKILL 15.2 – Select food and beverage service provider(s) and menu(s) following event design and within budget.

☐ KNOWLEDGE OF:

a. Attendee profile

b. Current food and beverage trends

c. Event history (e.g., past selections)

d. Venue and location

☐ SKILL IN:

a. Determining food and beverage requirements, including menu, arrangements to meet dietary needs or concerns, number of people, cancellation policy, margin for adjustment (e.g., gratuity), and minimum guarantee.

b. Identifying requirements for refreshment and beverage services, including supplies (e.g., alcohol, mixes, condiments, glassware, ice) and type of bar service (e.g., cash or host).

c. Addressing storage (e.g., refrigeration) space requirements.

d. Setting menus, including consulting with key stakeholders or sponsor, incorporating nutritional requirements, accommodating dietary restrictions, and addressing cost considerations.

e. Ensuring that serving staff are knowledgeable about menu and ingredients.

☐ **SUB SKILL 15.3** – Use relevant rules and regulations to manage alcohol service to comply with legal, organizational, and event policies.

☐ **KNOWLEDGE OF:**

a. Training programs

☐ **SKILL IN:**

a. Addressing liabilities and insurance requirements.

b. Identifying type of alcohol service (e.g., cash bar, host bar).

c. Ensuring that staff are trained in responsible beverage service.

d. Monitoring alcohol service.

e. Complying with applicable jurisdictions.

Skill 16 | Design Environment

☐ **SUB SKILL 16.1** – Determine event design and theme requirements based on stated objectives that meet attendee and organizational   expectations.

☐ **KNOWLEDGE OF:**

a. Attendee profile

b. Design concepts of meetings or events (e.g., learning formats, ergonomics)

c. Current trends

☐ **SKILL IN:**

a. Enhancing attractiveness and functionality of meeting or event.

b. Incorporating movement, methodology, and message into design concept.

c. Creating an environment to enhance performance, encourage desired behavior and learning, and fulfill stakeholder contract obligations (e.g., meet organization's brand requirements).

d. Integrating theme, branding, and ambiance into meeting or event environment.

e. Identifying needs (e.g., registration area, meeting rooms, exposition, storage, accessibility).

f. Complying with applicable jurisdictions (e.g., balloon releases, fireworks, lasers, capacity).

☐ **SUB SKILL 16.2** – Select décor based on event design to support the requirements of the meeting or event.

☐ **KNOWLEDGE OF:**

a. Décor elements for functional/experiential contexts

b. Props, scenery, and decorations

c. Design trends

d. Theme, budget, and objectives of meeting or event

e. Safety and security of attendees

☐ **SKILL IN:**

a. Reviewing theme, budget, and objectives of meeting or event.

b. Identifying assets and limitations of site.

c. Determining desired atmosphere for meeting or event.

d. Designing elements of décor plan including meeting or event theme and images, incorporating signage obligations (e.g., as defined in contract requirements), incorporating audiovisual or technical elements as appropriate, and complying with legislation (e.g., fire-retardant materials).

e. Submitting draft plan for approval as necessary to appropriate parties (e.g., board of directors, clients, fire marshal, stakeholders, levels of government).

f. Communicating plan to appropriate parties (e.g., site manager, meeting or event coordinator and staff).

g. Researching and securing décor and furnishing suppliers.

☐ **SUB SKILL 16.3** – Coordinate meeting or event signage by following the marketing plan to meet the requirements of the meeting or event.

☐ **KNOWLEDGE OF:**

a. Types of signage (e.g., digital, human, printed, sustainable)

b. Special accommodations signage (e.g., braille)

c. People and vehicular traffic patterns and traffic flow design

d. Signage restrictions

☐ **SKILL IN:**

a. Identifying signage requirements for meeting or event (e.g., language).

b. Developing signage that provides information and identification.

c. Selecting signage that enhances desired and/or required traffic flow.

d. Researching and selecting appropriate suppliers.

e. Coordinating installation and placement of signage at meeting or event.

f. Evaluating effectiveness of signage placement and attendee experience.

Skill 17 | Manage Audiovisual and Technical Production

☐ **SUB SKILL 17.1** – Identify staging and technical equipment requirements using event design to support meeting or event objectives.

☐ **KNOWLEDGE OF:**

a. Site limitations and restrictions (e.g., organized labor, low ceilings, pillars)

b. Program objectives

c. Audiovisual and production fundamentals

d. Special requirements (e.g., hearing impairment, vision impairment, allergies) of attendees, speakers, and performers

e. Current trends and technologies

☐ **SKILL IN:**

a. Reviewing program elements.

b. Determining staging and set requirements (e.g., size, height, surface, capacity).

c. Identifying equipment needs (e.g., lighting, sound, audiovisual, infrastructure, safety equipment, special effects, Internet access).

d. Securing permits or approvals for staging and equipment.

e. Specifying spatial needs and temporal and infrastructure requirements and restrictions.

☐ SUB SKILL 17.2 – Acquire staging and technical equipment based on defined requirements to support the event design.

☐ KNOWLEDGE OF:

a. Staging and technical equipment specifications

b. Types of suppliers and contractors

c. Technical terminology

☐ SKILL IN:

a. Coordinating specifications (e.g., detailing precise requirements for staging and equipment to be acquired, using proper product and service terminology).

b. Researching suppliers and contractors (e.g., obtaining quotes as necessary, negotiating and obtaining staging and equipment).

☐ SUB SKILL 17.3 – Install staging and technical equipment based on defined requirements to support the event design.

☐ KNOWLEDGE OF:

a. Staging and equipment specifications

b. Contingency planning

☐ SKILL IN:

a. Coordinating logistics of installing staging and equipment within meeting or event site (e.g., timing of arrival and delivery, placement).

b. Addressing safety issues or concerns (e.g., electrical cords, railings).

c. Determining availability of installation equipment, machinery, tools, and other assistive devices.

d. Hiring skilled installation professionals as required (e.g., stagehands, riggers, electricians).

e. Monitoring installation to identify necessary adjustments.

f. Conducting stage area walkthrough with appropriate personnel (e.g., technician, stage manager) to determine that requirements have been met regarding stage, lighting and audiovisual, special effects, stage security and safety, storage areas, and Internet access.

☐ SUB SKILL 17.4 – Oversee technical production and operation based on defined requirements to support the event design.

☐ KNOWLEDGE OF:

a. Stage management

b. Team leading and delegating

c. Safety and integrity of staging and equipment (e.g., access to power, weight load restrictions)

d. Location from which technicians will operate (e.g., booth, table, area, trailer)

☐ SKILL IN:

a. Coordinating with technical director and equipment operators.

b. Communicating roles, responsibilities, restrictions, and timelines with technical personnel.

c. Providing sufficient time and access for performer and technical rehearsals and equipment checks, including evaluation of all elements of program (e.g., program content, entertainers, sound, special effects, Internet) and adjustment of timing and sequencing.

d. Monitoring technical operations during meeting or event.

e. Managing disruption to performance or program.

Skill 18 | Develop Plan for Managing Movement of Attendees

SUB SKILL 18.1 – Develop admittance management plan to control protocols and efficiency.

KNOWLEDGE OF:

a. Admission and access control methods

b. Registration process (e.g., ticketing systems)

c. Crowd management techniques

SKILL IN:

a. Analyzing needs and requirements (e.g., capacity, criteria of access, restrictions).

b. Selecting admittance systems to be used (e.g., registration procedures, tickets, name tags, photo identification, wristbands).

c. Selecting technology to support admission systems.

d. Consulting with specialists (e.g., local police, security companies).

e. Drafting plan for admittance, including criteria, levels/categories (e.g., general admission, VIPs), methods, security, requirements for other on-site admission, communication policy, and special needs of attendees.

SUB SKILL 18.2 – Develop a plan for effective crowd management.

KNOWLEDGE OF:

a. Communication plan

b. Accessibility

c. Sources of specialist assistance in relation to crowd control (e.g., security companies, police)

SKILL IN:

a. Developing crowd management strategies for traffic flow (e.g., circulation, congregation), conditions exceeding thresholds (e.g., regulatory capacity levels), attendee behavior, and restrictions.

b. Determining appropriate entry and exit locations while considering admittance credentials, seating systems, safety, traffic flow, and queue management.

c. Ensuring that space, facilities, and services are adequate for attendees.

d. Verifying that appropriate signage is used.

e. Communicating policies and expectations regarding attendee behavior and restrictions.

f. Using systems and personnel to manage and monitor crowd conditions and behavior (e.g., having systems in place to respond to situations that exceed pre-established thresholds).

g. Obtaining services and equipment (e.g., ushers, security, signs, barricades, technology).

h. Securing approval of authorities (e.g., fire marshals).

i. Making sure that specific risk management issues associated with crowds are in place.

☐ SUB SKILL 18.3 – Coordinate housing requirements and define policies in line with organizational standards.

☐ KNOWLEDGE OF:

a. Types of accommodations
b. Reservation procedures and policies
c. Cancellation policies
d. Attrition
e. Deposit requirements
f. Payment procedures
g. Room blocks and rates
h. Corporate travel policies

☐ SKILL IN:

a. Coordinating accommodations (e.g., informing participants of reservation process) and responsibility (e.g., housing bureau, self-booking).
b. Determining and managing room blocks.
c. Determining accessibility requirements.

☐ SUB SKILL 18.4 – Coordinate transportation requirements and define policies in line with organizational standards.

☐ KNOWLEDGE OF:

a. Types of transportation available
b. Reservation procedures and policies
c. Cancellation policies
d. Deposit requirements
e. Payment procedures
f. Organization and corporate travel policies

☐ SKILL IN:

a. Organizing transportation.
b. Analyzing needs and options (e.g., airlines, taxis, charter buses), negotiating and contracting suppliers, ensuring accessibility.
c. Informing participants of reservation process and responsibility (e.g., deadlines, rates, self-booking).

☐ SUB SKILL 18.5 – Follow established protocol guidelines by adhering to organizational and situational requirements.

### ☐ KNOWLEDGE OF:

a. Protocol resources (e.g., foreign affairs, diplomatic missions, United Nations, protocol officer)
b. Titles and salutations (e.g., King, Queen, Prince, Princess, Honorable, Right Honorable, Excellency)
c. Styles of address
d. Religious, cultural, and ritual requirements
e. Regulatory issues (e.g., immigration, traffic laws)

☐ SKILL IN:

a. Determining protocol requirements (e.g., invitations, reception room, seating arrangements, introductions, transportation, accommodations, security, national anthems, business cards).
b. Securing appropriate personnel (e.g., to conduct ceremonies, to accompany VIPs).
c. Arranging for ceremonial equipment (e.g., flags).

DOMAIN H: SITE MANAGEMENT
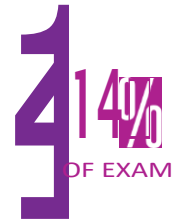
The Site Management Domain covers all of the details that the event manager

must supervise at the venue, area, location, property or specific facility to be used for an event. It includes site selection, designing the event's layout, managing the event on-site and event communication. This domain also includes venue accessibility considerations, conducting site inspections and layout considerations as well as developing plans for venue set-up and dismantling and shipping of event materials to and from the site and across borders. Finally, this domain covers establishing an on-site communications framework as well as communication equipment, procedures and protocols.

Exam Questions in Domain H 21
Questions in Skill 19 . . . . 6 - 7

Skill 19 | Select Site

SUB SKILL 19.1 – Complete needs assessment using event design to determine site specifications.

KNOWLEDGE OF:

a. Target market(s)

b. Accessibility needs of special populations (e.g., VIPs, individuals operating motorized vehicles)

c. Purpose of event or meeting

SKILL IN:

a. Reviewing nature, scope, complexity, and fiscal requirements of meeting or event (e.g., budget, profile and image, facilities licensing, season, anticipated attendance, flexibility, accessibility security and safety needs).

b. Determining desired or required geographic location and type of facility for meeting or event.

c. Defining spatial needs, proximity, and housing patterns and accessibility requirements for site.

d. Identifying dates and durations of site occupancy.

e. Developing site selection criteria.

SUB SKILL 19.2 – Identify and inspect sites based on event design and according to selection criteria.

KNOWLEDGE OF:

a. Site infrastructure

b. Risk management factors

c. Budgetary restrictions

SKILL IN:

a. Researching potential sites (e.g., reviewing sites of similar types and scopes of meeting or events) and researching competing events.

b. Conducting site inspection, including investigating and evaluating site (e.g., using site checklist, verifying viability of facilities and services, determining availability of services).

c. Prioritizing selection criteria.

d. Evaluating possible sites, including evaluating location based on proximity to hotels, availability of parking in area, and accessibility (e.g., public transportation, air lift) and rating sites based on dates, rates, space, guest rooms, and other capabilities or constraints.

e. Identifying best site and communicating information to colleagues and key stakeholders to secure approval.

f. Reserving and confirming site (e.g., negotiating and contracting facility, outlining responsibilities).

g. Maintaining and developing effective working relationship with venue personnel.

Skill 20 | Design Site Layout

☐ **SUB SKILL 20.1** - Develop site maps and floorplans according to event design and requirements to achieve event goals and   objectives.

☐ **KNOWLEDGE OF:**

a. Adult learning principles

b. Meeting or event profile, features, budget, and program

c. Meeting or event concept and theme

d. Budgetary implications

e. Applicable jurisdictions (e.g., access, fire codes)

☐ **SKILL IN:**

a. Determining needs for space, structures (e.g., fixed and temporary), adult learning needs, utilities (e.g., power, water, sewage, gas), parking, communications, areas for first aid and lost children, emergency access, legal requirements (e.g., fire regulations), signage, translation or interpretation needs, and accessibility.

b. Confirming location of structures and facilities within site.

c. Drafting site plan, recognizing: structures (e.g., existing permanent and temporary), facilities, services, exhibit space, meeting or event program, attractions, human and vehicular traffic flow, environmental implications, best use of resources, security, and meeting service areas (e.g., registration, bookstore).

d. Establishing space assignments and setup configurations: obtaining expert advice on configuration when needed, building in flexibility to allow for adjustments, detailing placement and configuration (e.g., orientation of temporary structure openings), and implementing accurate scale diagrams.

e. Inspecting site and reviewing site plan for accessibility, washrooms, obstructions, capacity limits, loading dock or loading entrance, special needs parking, vehicle road access, and   utilities.

f. Adjusting and communicating changes to site plan.

Skill 21 | Manage Meeting or Event Site

☐ **SUB SKILL 21.1** - Create logistics plan for site setup, operation, and takedown using event design to achieve goals and   objectives.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Confirming access to site (e.g., specific date and time).

b. Preparing detailed production schedule, including floor plans, timing, room setups, personnel required, roles and responsibilities, exhibit setup, and security (e.g., badge checkers, personnel).

c. Making arrangements for shipping/receiving and storage.

d. Determining that human resources are available for setup and takedown.

e. Defining and implementing site move-in and move-out requirements and restoration including key contact points.

f. Communicating plan to appropriate individuals.

g. Integrating plan with other aspects of meeting or event.

☐ SUB SKILL 21.2 – Implement logistics plan during site setup to meet event design and requirements.

☐ KNOWLEDGE OF:

a. Contractual obligations with suppliers

b. Delivery schedules

c. Health, safety, security, and environmental considerations

☐ SKILL IN:

a. Confirming access to site.

b. Communicating production schedule and responsibilities to appropriate individuals (e.g., staff, suppliers).

c. Determining that personnel are familiar with equipment being used.

d. Following up to determine that progress is being made according to production schedule (e.g., arrival of services, deliveries and equipment, arrival of related groups, technical rehearsal time and performer/participant orientation, special facilities including dressing rooms, guest rooms/lounges, equipment rooms, and staff office).

e. Ensuring that equipment is checked and operational.

f. Determining and coordinating inbound inventory.

g. Adapting plan to changing circumstances (e.g., briefing all personnel involved).

☐ SUB SKILL 21.3 – Implement logistics plan during event to meet event design and requirements.

☐ KNOWLEDGE OF:

a. Typical systems, procedures, and logistics for on-site management

b. Contractual obligations

☐ SKILL IN:

a. Monitoring meeting or event operation through observation and appropriate communication and control mechanisms.

b. Identifying, analyzing, and implementing response plans to operational problems or need for additional services as issues arise.

c. Monitoring and determining effective delivery of services through ongoing communication with contractors.

☐ SUB SKILL 21.4 – Implement logistics plan during dismantle to meet event design and requirements.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Communicating production schedule and responsibilities to appropriate individuals (e.g., staff, suppliers).

b. Returning site to condition specified in contract/agreement (e.g., determining that equipment is checked and operational, confirming that suppliers have removed their items from site, removing hazards caused by installation of temporary structures, removing waste and decorations, considering recycling options).

c. Debriefing personnel and identifying relevant points for meeting or event evaluation.

d. Completing all relevant documents and records according to organization's procedures.

Skill 22 | Manage On-site Communications

☐ SUB SKILL 22.1 - Define on-site communications plan aligned with marketing plan to meet event goals and objectives.

☐ KNOWLEDGE OF:

a. Communication models and processes

☐ SKILL IN:

a. Defining communication needs of meeting or event (e.g., individuals, meeting or event features).

b. Identifying types of messages to be communicated to internal and external public and personnel (e.g., announcements, updates, results, changes) and outlining content and style of messages to be communicated, including terminology and language.

c. Developing communication resources including verification documentation (e.g., specifications guidebook, production book) and contact lists (e.g., attendees, staff, suppliers, emergency services).

d. Setting up communication channels that facilitate flow and scope of communication needs.

☐ SUB SKILL 22.2 - Determine and secure required communication equipment and resources to meet event requirements.

☐ KNOWLEDGE OF:

a. Communication equipment and resources

☐ SKILL IN:

a. Analyzing needs while considering type and size of venue and users (e.g., staff and volunteers, emergency personnel).

b. Developing guidelines for users (e.g., frequencies, usage) and issuing and maintaining equipment.

c. Obtaining equipment and services (e.g., cellular telephones or mobile devices, two-way radios, pagers, PA system, web-based technology, tablets).

d. Integrating technology from all parts of meeting or event into communication plan (e.g., technical production, signage).

☐ SUB SKILL 22.3 - Specify communication procedures and protocols for each audience based on the event requirements.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Specifying techniques for internal and external communications (e.g., written, audio, visual, and electronic).

b. Identifying types of messages to be communicated.

c. Coordinating briefing and debriefing meetings.

d. Establish the protocols and monitoring communications (e.g., radio discipline).

e. Creating a plan and team for crisis or emergency situations (e.g., equipment failure).

f. Training staff in use of equipment, locations of services, and protocol (e.g., what is appropriate to relay by radio).

DOMAIN I: MARKETING
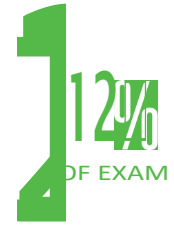
This domain outlines the skills required to promote an event. The domain

includes steps for developing and implementing a marketing plan, including conducting a situational analysis, defining target market segments and selecting marketing distribution channels. Also covered in this domain are best practices for managing marketing materials and event merchandise and steps for promoting an event. Finally, this domain also includes public relations activities and managing meeting-related sales activities.

Exam Questions in Domain I **18**
Questions in Skill 23 . . . . **2 - 4**

Skill 23 | Develop Marketing Plan

☐ SUB SKILL 23.1 – Conduct a situational analysis using historical and current data to develop the marketing plan to meet goals and objectives.

☐ KNOWLEDGE OF:

a. Data collection and analyzing techniques

b. Marketing models and concepts such as "marketing mix"

c. Mission statement, goals, and objectives

☐ SKILL IN:

a. Reviewing historical data (e.g., surveys, evaluations, budget).

b. Evaluating meeting or event features (e.g., location, service, merchandise, resources, promotion, price, image).

c. Assessing target market(s).

d. Defining attendee/participant needs and expectations.

e. Analyzing community infrastructure and resources.

f. Researching new marketing techniques and platforms available.

g. Identifying opportunities to expand into new markets.

h. Determining legal and regulatory restrictions that may affect meeting or event.

i. Summarizing results of situational analysis, including making recommendations and conclusions while considering budget and resources.

☐ SUB SKILL 23.2 – Identify target market segments using the situational analysis to determine key features, products, and services.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Developing profiles of potential meeting or event attendees/participants/exhibitors/sponsors (e.g., using demographics and psychographics).

b. Matching target segment profile to features, products, and services.

c. Defining geographic reach of meeting or event.

☐ **SUB SKILL 23.3** – Select marketing distribution channels using the situational analysis that aligns with the marketing plan.

☐ **KNOWLEDGE OF:**

a. Different types of marketing platforms (e.g., social media, advertising, email campaigns)

☐ **SKILL IN:**

a. Analyzing available distribution channels for market penetration.

b. Matching messages to target market(s) using best approach.

c. Selecting most effective distribution channels that provide best return on investment.

☐ **SUB SKILL 23.4** – Implement marketing plan to reach targeted segments to support the goals and objectives of the meeting or event.

☐ **KNOWLEDGE OF:**

a. Available marketing platforms (e.g., social media, advertising, email campaigns).

b. Target market preferences

☐ **SKILL IN:**

a. Communicating goals and objectives of plan.

b. Coordinating and monitoring marketing activities with other aspects of meeting or event production.

c. Adjusting marketing plan and communicating changes to stakeholders.

d. Developing evaluation of marketing activities.

e. Maintaining consistency with brand and message with mission statement, goals, and objectives.

Skill 24 | Create and Manage Marketing Materials

☐ **SUB SKILL 24.1** – Determine marketing materials that meet target market needs and support the goals and objectives.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Determining marketing collateral needed for marketing and meeting or event activities (e.g., brochures, programs, tickets).

b. Analyzing media available to meet requirements (e.g., print, electronic).

c. Identifying marketing message for each target market segment.

d. Selecting marketing platforms.

☐ SUB SKILL 24.2 – Develop marketing content and design specifications based on the marketing plan to maximize impact.

☐ KNOWLEDGE OF:

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ SKILL IN:

a. Determining style of marketing collateral for target market (e.g., design, format).

b. Incorporating and monitoring brand message (e.g., logos, slogans, positioning statements).

c. Approving/preparing layout for printing and production.

d. Securing permission to use intellectual property, copyrighted materials, and licensed materials.

☐ SUB SKILL 24.3 – Produce and distribute marketing materials to the target markets in alignment with the marketing plan.

☐ KNOWLEDGE OF:

a. Procurement plan and processes

b. Contact distribution lists

c. Promotional activities schedule

d. Potential impact of geographic location of provider (e.g., customs, shipping)

☐ SKILL IN:

a. Researching providers and communicating specifications.

b. Determining delivery method and deadline for each item produced (e.g., coordinating delivery logistics).

c. Monitoring quality and accuracy of text and matching to specifications.

d. Organizing and assembling materials for distribution.

e. Complying with information management plan for archiving printed/imprinted materials.

Skill 25 | Create and Manage Meeting or Event Merchandise

☐ **SUB SKILL 25.1** – Determine product design and specifications using the marketing plan to support the meeting or event objectives.

☐ **KNOWLEDGE OF:**

a. Meeting or event theme, branding, and key messages

☐ **SKILL IN:**

a. Reviewing historical data (e.g., types of merchandise, how and where sold, price points).

b. Researching customer needs and interests.

c. Assessing need to modify or discontinue existing merchandise: identifying new or replacement merchandise.

d. Evaluating competition (e.g., other similar products, price points, merchandising venues).

e. Determining potential liabilities and legalities associated with merchandise.

f. Defining product design and production specifications.

g. Identifying new marketing approaches and platforms.

h. Integrating product concepts with other marketing activities (e.g., advertising poster upgraded to merchandise quality poster).

Skill 26 | Promote Meeting or Event

☐ **SUB SKILL 26.1** – Develop cross-promotional activities to expand market reach aligned with the marketing plan in support of the goals and objectives.

☐ **KNOWLEDGE OF:**

a. Impact of meeting or event on local community (e.g., economic benefits, social responsibilities)

☐ **SKILL IN:**

a. Assessing potential partnership opportunities with sponsors, donors, suppliers, and other compatible organizations.

b. Evaluating opportunities and costs to promote meeting or event at venues of other non-competing meetings or events with similar target market segments

c. Determining resource requirements (e.g., print materials and merchandise).

d. Coordinating launch dates of each promotional activity.

☐ **SUB SKILL 26.2** – Develop promotions to create awareness through platforms to reach goals and objectives.

☐ **KNOWLEDGE OF:**

a. Budget allocation

b. Branding and message of meeting or event

☐ **SKILL IN:**

a. Determining type of promotion(s).

b. Assessing liabilities and legalities.

Skill 27 | Contribute to Public Relations Activities

☐ **SUB SKILL 27.1** - Develop, implement, and manage public relations strategy to align with the marketing plan.

☐ **KNOWLEDGE OF:**

a. The knowledge needed for this task is incorporated into the following skill statements.

☐ **SKILL IN:**

a. Developing and implementing communications plans.

b. Developing and implementing public relations strategies .

c. Developing and managing emergency response and risk management plans.

Skill 28 | Manage Meeting-Related Sales Activities

☐ **SUB SKILL 28.1** – Reference the marketing plan and support development of the sales plan with objectives.

☐ **KNOWLEDGE OF:**

a. Marketing plan

b. Competitors' sales practices

☐ **SKILL IN:**

a. Identifying legal, regulatory, and ethical requirements for sales.

b. Specifying revenue sources (e.g., registration fees, advertising, products).

c. Setting sales objectives for all meeting or event products (e.g., reviewing historical data on previous sales figures, identifying previous target market segments).

d. Defining potential target market segments.

☐ **SUB SKILL 28.2** – Execute activities from the sales plan to meet the goals and objectives.

☐ **KNOWLEDGE OF:**

a. Procurement plan and process

☐ **SKILL IN:**

a. Integrating sales tactics with promotional and advertising activities to encourage desired consumer behavior.

b. Using sales tools and tactics (e.g., qualifying leads, conducting sales calls, delivering sales presentations, packaging products, providing sales incentives, providing giveaways, using telephone sales).

c. Closing sales, including negotiating sales details (e.g., cost/price, shipping fees) and setting dates for product delivery (e.g., booth setup, merchandise delivery).

d. Checking for unauthorized on-site or remote sales activities.