PROPOSALS
RESPONDING TO REQUESTS AND CREATING WINNING PROPOSALS

BUSINESS EVENTS VICTORIA

VICTORIA State Government

ACKNOWLEDGEMENTS

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We acknowledge Meetings and Events Australia (MEA) for their partnership and industry expertise applied in developing the content for the Business Events toolkits. Operating since 1975, MEA is the Australian event industry 's oldest and largest peak body. It serves its members and educates the industry holistically, dedicating itself to promoting professionalism and providing excellence across more than 14 industry sub-sectors. MEA promotes growth in the events sector by creating business opportunities, delivering both accredited and bespoke training and professional development, building a skilled and informed workforce, and advocating on behalf of industry to all tiers of government.

ACKNOWLEDGEMENT TO COUNTRY

Business Events Victoria acknowledges the Traditional Aboriginal Owners of Country throughout Victoria and pay our respects to them, their connections to land, sea, and community. We pay our respects to their Elders past, present and future Traditional Owners.

BUSINESS EVENTS TOOLKIT

Explore the other toolkits

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MAKING A GREAT FIRST IMPRESSION

It's easiest to make a great first impression when you and your team are clear about what product/service you are offering.

What's your USP? Think about your Unique Selling Point – the thing that you and the team do well or the best part about your product. This may be the location (eg: great views, close to other services) or perhaps an aspect of the product (eg: range of meeting rooms, creative food offerings by a well-regarded chef) or your customer service (eg: experienced and attentive team). These are the key things that make your product stand out from the competition so make sure you share this with enquirers and when responding to booking requests or when marketing to the business event sector.

Think about your value proposition - this is the statement that communicates your product and what you deliver to your clients. When handling any enquiry, and when marketing your product, it is very useful if all the team is clear what the value proposition is. Perhaps have it printed out next to the phone or desk so its front and centre in the minds of the people answering the phone when they are speaking with clients.

ENQUIRIES

Enquiries from business event professionals may come by telephone, email or via your website enquiry form if you have one. They may also come directly as a Request for Quotation (in shorthand an 'RFQ' or sometimes called Request for Proposal – RFP).

A RFQ is sent to potential suppliers asking for a quote for services and tends to happen when:

- Event organiser doesn't know your organisation / venue
- Event organiser is interested in comparisons on price/facility/option
- It is a part of their standard operating procedures (SOP).

Before this happens, most event buyers will do a search online and look at your website. Be sure you have lots of information about your services available to tempt them to call you. See the toolkit *Business Events Marketing Guidelines* for help on this.

Asking the right questions

If an enquiry comes by telephone, then whoever answers the phone needs to be prepared to, at least, take some initial details so that the event person in your team can call the enquirer back. It is important to be responsive and interested in the initial enquiry as this helps the buyer feel confident in the team's abilities to meet their needs.

Key tips on being responsive and demonstrating interest during the initial enquiry.

This happens when the person answering the call:

- Listens carefully and takes good notes
- Has a warm and personable telephone manner
- Repeats back key information to check it is correct
- Passes the enquiry onto the relevant event person fast.

This also happens when the event team member:

- Follows up the caller to thank them for the enquiry and to ask details/clarification before formally quoting – even if the initial call was handled well and there are great notes and there is no real need for additional information.This is because it is a great way to introduce the event team member to the buyer, explain they will be sending through the proposal or quotation and start building rapport
- Responds quickly – acknowledgement of one working day is ideal and reflect professionalism
- Sends out requested information or quotation quickly – 2/3 working days if you can, as this then looks look like you want the business.

If an online enquiry form is used via your website, be aware that these can seem a bit impersonal and can lack space for enough detail. If you use one it is imperative to respond fast, a phone call to thank the person for the enquiry is a nice touch and you can give them guidance on when you will be responding with the quote.

Recommend having an *events@* email if you can, so things don't get lost. Ensure that the personality of the organisation comes across in all communication including any online presence.

TAKING THE ENQUIRY

Use a checklist / enquiry form for getting as much information as possible from prospective clients on first contact. It is useful to read this section alongside the Sample Enquiry Form. *See Client Enquiry Form template*

The benefits of a checklist used for all enquiries is that:

- All relevant information is gathered at first call / contact
- Less experienced team members don't get flustered
- It gives everyone confidence to help 'sell' this type of event / experience
- Nobody is told 'the event person isn't here today'
- Starts the conversation and keeps it flowing
- It is a professional approach
- It creates a good impression as it can be used to check or confirm information and shows the enquirer you are systematically gathering all you need to best help them
- It builds confidence in your own team of their abilities to handle enquiries for events
- It builds confidence in the enquirer that they are dealing with a professional team who can manage their event.

Questions to ask when taking an enquiry (See *Client Enquiry Form template*)

Getting as much information as possible will help you put together a proposal that really suits the event needs and give you a better chance of being the selected supplier. Using an Enquiry Form or a Checklist means that anyone who answers the phone can take down as many details as possible and anyone who picks up the enquiry can then use it further to add to the information collected in the first call.

It is vital that all enquiries are responded to as soon as possible, and checking with the client when they need a response will help you meet their needs. If the person answering the phone isn't the person who will handle the enquiry, it is best to give their name and, if possible, an indication of when the call will be returned. End the call with a thanks to the caller for considering the business for their event.

This checklist can also be used when the client visits you for a site inspection as it can be updated or the initial information checked at that time.

<u>**Client details**</u> – get as much information as possible from the client. This should include:

- **Event name** – this is useful as there may be a number of events in your calendar on the same day / week and it helps to differentiate between bookings
- **Organisation name**: the organisation hosting the event – this may be different if you are responding to an enquiry from an Event Manager or Professional Conference Organiser (PCO) representing another organisation
- **Organisation of the enquirer** – eg: if a PCO or Event Manager then get their company name (if relevant) and their own name
- **Contact name** – this is the name of the person you are speaking with, and generally this will be who the proposal should go to
- **Position** – in the organisation if relevant
- **Email** – their email address as most proposals would be sent this way and check this carefully so you can be sure your proposal reaches them .
- **Telephone (Office)** – though it's fair to say many people now only use a mobile number
- **Telephone (Mobile)** – check this carefully so you can call them again if needed
- **Address (if needed)** – it is good to know where the client is from, as an interstate client or one unfamiliar with your area will appreciate extra information about your region. This can be included in your proposal and shows you are proactive in providing as much information to the client as possible to tempt them to accept your quote and give you the business.
- **Event goal(s)** – this helps you understand why the organisation is hosting an event and what they may wish to achieve.For example, if it's a networking event you may want to offer a room that is conducive to people mingling and chatting; if it's a training seminar, then you will need to consider a private and quiet space; if it's a social event, you may consider what type of entertainment you can recommend, etc
- **Budget** - this helps you determine if the potential event is viable or attractive to you. It also helps you construct a quote and/or proposal document that is likely to be accepted as it fits in with the budget allocated to this event. Clients will generally share this information freely as they don't want to waste your time if you cannot provide a service within their budget, nor do they want to waste their own time waiting for a quote that is too expensive or them

Event details - get as much information as possible from the client. This should include:

- **Event date and days and duration** – it's worth asking this early, as if you are fully booked on the preferred days/dates you can see if they are flexible and if so still quote. It's useful to check that the days and dates match to avoid any confusion
- **Start and end times each day** – this is also useful to confirm that you have capacity to manage the event at what may a busy time
- **Event type** – eg: this may be seminar, conference, training session, board meeting, retreat, networking, social function, etc. You need this to understand what type of event the client is hosting and you can tailor your proposal accordingly
- **Event concept or theme** – some events have a concept or theme which may impact on some of the services you offer (eg: themed food, entertainment assistance etc)
- **Rooms/spaces or other requirements** – how many meeting rooms or services are needed? It is useful to gauge this early in the conversation so you can determine if your offering can match their needs and how flexible the client is regarding these. This helps when putting the quote or proposal together as you may be offering a range of alternatives
- **Anticipated number of attendees** – very important to check you have space and can manage a booking for that number on the preferred day
- **Guest type (demographic or other information about guests at this event)** – this is important so you know the type of people who will be experiencing the event and tailor your proposal to suit their possible expectations and needs. For example: food choices are often determined by guest demographic, event type and sometimes the organisation themselves, eg health or wellness sector.

Services and equipment required - get as much information as possible from the client. This will depend on the type of event and your business type, but may include:

- **Room(s) / Space(s)** – check how many meeting or function rooms are needed for the event. Clients often look for a range of spaces to fit how they like to run their event or how the content is going to be delivered.They may be flexible to fitting their event into your space but it's worth asking for their preference and checking flexibility if this won't work well in your space
- **Room Set Up / Layout** – this allows the client to tell you their preferred layout and you to see if you have capacity for this. It also lets you suggest an alternative that they may not have considered but that will still suit their needs too
- **Catering** – this should cover the number of food services, eg: morning/afternoon tea, lunch, after event drinks, dinner, etc and get an indication of the type of food, eg: light or seated lunch, finger food etc. All events need food and this may be an area where you shine so the more information you can gather regarding client needs, likes and prior experience will help
- **Audio-Visual** – all events also need attendees to be able to see and hear what is happening so having available presentation equipment (projector, screen and possibly laptop) and microphone is helpful. This may be something that you outsource to a supplier or collaborator business, so it's important to ask for as much detail as possible so you can share these with the relevant team

- **Accommodation (overnight)** – attendees or clients often travel from a distance to attend a business event, so check how many people are likely to be staying overnight and for how many nights. It's common for the client or Event Manager to come the night before an event to set up and be on site in good time for the event day. Depending on how far they need to travel, they may stay the last night of the event too. If you don't have overnight accommodation to offer, consider partnering with a venue who does or at least have some you can confidently recommend.

- **Signage** – this may be something that is arranged at a later date, but the event will want to ensure attendees can find the event at your organisation, so keep in mind how you will make that happen. You may have A-frame notice boards etc that you need to book to ensure this event has access to that facility, so it's worth finding out if this service is needed as early as you can so you can allocate something for it.
- **Other services / other information –** this is where you ask if there is anything else they need assistance with. You may not be able to assist with all the event requirements that are needed, but hopefully you will have a list of suitable suppliers in your area that can help. A longer term benefit of asking this question is that you gather information about the type of services being requested, and if there is a trend, consider how you may be able to add them to your own offering
- **Marketing information** - it is invaluable to find out how the prospective client heard about you as this helps to show you where you should put your marketing efforts and dollars and confirm if marketing activities have been fruitful in driving enquiries to your business.It also allows you to thank anyone who has recommended you
- **Proposal due** – it's very important to ask the client when they need the proposal or quotation by. Sometimes multiple quotes have been requested and will be compared. We recommend completing the proposal before the deadline if you can and then diarising a note to check it's been received and if there are questions or if the client wants to book. More about that in *Asking for the Business* below.

It is worth noting that lead times have shortened considerably since pre-Covid. Whilst this is indicative of confidence returning to the industry it does put pressure on supplier teams to respond very promptly. Average lead times are around 12 weeks.

Note: for other services or products, these questions will need some amendments, but the overall guidance here is to ask as many questions as possible about how an event may need to use your product. You can amend the checklist example based on how your guests usually interact with your product.

TYPES OF PROPOSALS

An RFQ requires you to wait for the business to come in. There are proactive proposal opportunities where you seek the business through marketing yourself to prospective buyers which can include providing services as a sponsor to showcase what you do. Another proactive method is to take part in collaborative proposals with others in your region to try and persuade or bid for an event to come to your area.

RESPONDING TO RFQ - PROPOSAL INCLUSIONS

Designing a template that can be used for every proposal is well worth the time spent. *See Proposal Template*. This saves time as, undoubtedly, most proposals will include similar information each time, especially information about the business and local area which does not change. It also ensures that proposals have a consistent message and quality, that key information is always included and that checks for information, spelling and grammar only happens once.

Writing a Good email (or letter) to introduce your proposal

This is the first impression the client will have so it's worthwhile taking time to craft an email that helps build a successful relationship. Keep it relatively short as the real selling tool is your proposal.

Email or letter thanking the client for their enquiry – this should include:

- Name of event
- Date
- Thank them for considering your business (use business name here)
- A paragraph or two highlighting the unique selling points of your business
- Inform them that the proposal is attached – this will help your email system remind you if you forget to attach the file
- Closing remarks such as 'please do not hesitate to contact me if you have questions or if I can help you further with this proposal' - you can insert your phone number here too
- Closing salutation – recommend Kind or Best regards
- Your name and contact details (email and telephone).

THE PROPOSAL

This document showcases your organisation and its professionalism. In a competitive bid setting (ie you are competing against other venues or products) this can be the difference between winning or losing the business. Inclusions explained for the perfect proposal are as below.

Your proposal can be the difference between winning or losing a piece of business.

Attractive front cover – recommend a good image of your venue, service or product with your business name and contact detail. Add the name of the event you are bidding for, the organisation and date of event. Also include date the proposal was written.

Inside page should have confidentiality/copyright clause regarding the content.

Quote validity date – at the beginning or end, eg: inside page or penultimate one.Recommend set a validity period for your quote as prices often change and you don't want to be disadvantaged if a client comes back to you after that date and prices are no longer current.The current industry practice averages around 2 weeks.

All about your business – this is a summary of your services and business.Images are very powerful here as they can convey meaning more efficiently than written word. This can also include:

- Your USP (unique selling point); tell the reader what makes your business special and what particular aspects of the business you are proud of, eg: this may be your service, your location, food and beverage or longevity of business
- Include accolades or awards for your business and your team if relevant
- Profile/s of the event team member/s managing the enquiry can be added
- Other services you offer which have not, as yet, formed part of the request for quotation
- Testimonials from delighted customers (which could also have their own section if preferred)
- Key images and general pictures of aspects of your business which can include other business events happening in your venue showing the space in the best light
- Sustainability activities/practices that your business engages in can add value to the proposal as these are highly regarded by the business event sector.

Summary of your understanding of the client's requirements – this helps the client feel confident that you have understood their needs and can deliver their event, ie:

- Dates of event
- Numbers attending
- Program information if relevant
- All services (see next)
- Any special requests
- Budget if provided.

Rooms/spaces proposed - specific to the client's needs.

- This should confirm the suitability of your venue for the event by confirming how the layout (room set up) will suit the client requirements and objectives
- Include capacity charts to confirm the space is suitable
- Include floor plans showing room layout in their preferred option
- Include images of the room/s, preferably set up as it would be for the client's event (eg: business)
- Natural daylight in meeting rooms is highly sought after, and many business events demand it but don't always ask about it in an RFQ. Make sure you tell the reader that you have it if you do
- Outside space that can be used for breaks can also add value to the proposal as, in nice weather, attendees will enjoy spending some time in the fresh air, eg: during formal breaks such as morning tea
- Cost of each room can go here but should also go into an itemised quote in tabulated format
    - It's common place for room hire to be waived if there is sufficient food and beverage spend, so if that is the case for your organisation be sure to tell the client that here.

Audio-visual (AV) and other technical requirements - to meet the client's needs

- This may include information gathered from your AV supplier. It's preferable to include this in your proposal rather than ask the prospective client to contact them directly though this may work if the requirements are complex
- Standard AV needs are:
    - Presentation equipment - projector, screen
    - Laptop – clients often bring their own, but it's worth noting if you need to provide one or not

    - Audio equipment – lapel and/or handheld and/or lectern microphones
    - WI-FI for presenters and attendees – a business event client would expect this to be available and free of charge
    - If any items are free as standard, be sure to tell the client that
- Cost of AV can go here but should also go into an itemised quote in tabulated format.

Catering with sample menus (to tempt and showcase) – this is one where images help to tell the story of delicious food offerings well

- Include your Food and Beverage (F&B) packages if you have them
    - However, if you may like to offer a sample menu suggestion to help the client visualise what food might work for their event which adds value to the proposal as it shows you're thinking how you can best help them create a great event
- Include sample menu costs but these should also go into an itemised quote in tabulated format
- If a certain F&B spend is required for free room hire, you can reiterate that here too.

Accommodation – if overnight accommodation is requested include:

- Range of room types
- Accompanying images
- Costs of each room type can go here but should also go into an itemised quote in tabulated format
- Include information here on any room upgrades or added value items you are prepared to include for this client (eg: free breakfast, discount over a certain number of room bookings, etc)
- If you have no accommodation yourself, you may like to include quotes you have gathered from your recommended suppliers nearby which is always much appreciated as it shows you are very interested in hosting their event
    - It is suitable to provide a link to a range of options but the previous tip saves the client time and indicates a strong interest in this business.

Parking – include the availability of secure parking, which is advantageous, especially in busier locations.

Accessibility facilities – include information on disabled access, hearing loops and accessibility services.These may not be requested in the RFQ but neither you nor the client will know if these are needed yet and the client may assume that these are available as they can be commonplace. It is best to confirm that they are available rather than not be able to meet a need later on if they are not.

Other facilities – anything else that you have at your venue or service that can add value can be included in a relevant section, eg: the availability of electronic signage to guide attendees to the right room.

Breakdown of costs – should be itemised in a detailed costing page in tabular format as this is the industry standard; prices (as noted above) can be included in each section and then re-confirmed in the overall quote. Itemising each service or product allows the buyer to understand all costs that will be incurred and to use your quotation when finalising their own budget for the event. See *Sample Cost Breakdown template*.

Other documents – whilst you would not usually include evidence of insurance or business registration or risk assessments in an RFQ, these may be required for some proposals.

Other important points to remember for your proposal document:
To enhance the content of the proposal, it's important that it looks and sounds professional. More tips for the perfect proposal:

- Attractive and well presented – with appropriate use of fonts, font size, colour, graphics or charts or tables if they help express information clearly and quickly (eg: room capacity charts)
- Use strong visual images of your spaces or service being used – if you are bidding for a conference, it's good to have images of the spaces used in this way and rooms set up for conferences rather than social functions
- Include maps showing your location and other services in the vicinity – to ensure the client knows where you are
- Include hyperlinks to more information if relevant, eg: you could include a link to the menu page on your website (though attaching sample menus is better if you can) or to the local regional information centre or tourism pages
- Multi-media can help sell the story of your product so consider embedding a quick video tour or including a link to this
- Numbered content pages help readers find information quickly – you can include a table of contents if you like for very large documents; this is a big help for something over 10 pages

- Easy to read – use plenty of white space on the page so that the information is easy to locate and use section headings and subheadings and bulleted lists if this helps express information clearly for the reader
- User friendly – a good layout helps the reader find relevant sections
- Appropriate professional language and tone – the personality of the organisation needs to come across but avoid casual language or phrasing
- Persuasive – promoting key selling points or USP to remind the client why you are a good fit for their event
- Writing concisely is appreciated but ensure you have included enough detail to sell your service to the prospective client
- Be error free – no spelling errors, typographical errors or missed information. It helps to get someone else to check before you send it and using a template will also help here as you only have to get the standard inclusions right once
- Inspire confidence by being professional, authoritative, accurate and with no gaps in information.

DESTINATION (OR REGION) BIDS - COLLABORATIVE PROPOSALS

This is when your region works together to scope business events or other opportunities and, in collaboration, constructs a proposal to tempt that event to come to you. This collaboration on a destination bid brings organisations together to bid for an event that has been identified as potentially interested in holding it in the region. The proposal needs to sell the region to decision makers encompassing all elements needed to make the event happen.

The proposal document you create to respond to an RFQ or other enquiries can also be used to participate in destination or regional bids.

These may also be part of a destination bid instigated by the local government, your regional tourism board or by Business Events Victoria. The benefit of working with these professional organisations is that they will often gather the information from each organisation and collate it for the event decision maker.

Collaborative bids meet business event expectations and demonstrate an area's capacity required for an event.

Collaborative bids are commonplace and meet business event expectations for a number of reasons. They demonstrate that the area has the capacity required for the event, the capability of working together which raises their confidence that an event in this region will be successful.

Cooperating and working together with others in this way can help a business to expand their knowledge and expertise through the exposure to other businesses and professionals. It also builds connections and network and lead to referrals, co-working and greater opportunities in the future.

A range of organisations and services will be needed to meet the needs of most business events, eg:

- Venues: sharing allocation of space, perhaps offering business sessions in one venue and social functions in others
- Overnight accommodation providers: a range of different star ratings and price points can be attractive to an event where attendees are self-financing
- Audio-visual expertise to enhance the event experience
- Local transport: coaches or other methods of getting people around the area or from the business component to the social elements or for transport to the area
- Local food and beverage: showcasing the best of food, wine, and locally grown produce
- Local entertainment or arts: to provide interest at social functions
- Tourism experiences that can be incorporated into the event content and tailored to the conference or business event objective. These are also attractive for tourism experiences before/after the event to encourage attendees to stay longer in and explore the region.

Tips for joining a destination (or region) bid

The Association of Australian Convention Bureaux is the peak Australian business events network driving economic prosperity for Australia. They will have good intelligence on which conferences may be interested in a regional component or hosting elements outside of a state capital. This is often filtered through local associations.

Tips:

- Get involved with your local networks - Most destination bids for domestic events come through the local tourism network or are generated via Business Events Victoria. Regional businesses can offer distinctive experiences that best represent the region and this will need to match the client's stated needs but allows you to be creative to do so
- Form a bid team – work with like-minded professionals whose ethos and quality of product matches your own
- Money can't buy experiences - Tailoring your offer to the event buyer's stated needs is important for all proposals but for destination bids make sure to include the 'money can't buy' experiences you offer to VIP guests. Business event buyers will expect to see tailormade product that is not simply what is offered on your website, eg:
    - For wineries: barrel tasting with the winemaker rather than joining the usual cellar door tasting experience

- For accommodation: rooms with views as much as are available
- For tourism offerings: private tours for small groups that take guests to the most special parts of your region
- For food and beverage inclusions: chef quality or curated food and drink from the region.

Financial and other support to bring events to your region

Subvention - This occurs when a regional bid has the support of the local council or state government entity who recognise the economic benefit the business event will bring. This may be attractive to government departments active in the region when the attendees are aligned to an important regional industry area.This subvention is a financial support for the bid via a grant because the event drives dispersal and brings economic contribution to the regions, as well as supporting government policy initiatives and strategic objectives.

A region or destination may find this tempting to attract a particular event which will provide a strong publicity platform for the region as well as being of economic benefit. The individual region/destination needs to consider all aspects of the bid, not only the dollars, but the sponsorship of local products to strengthen their bid. This is also a good opportunity to involve local government for support in the promotion of the region.

Government departments and councils publish their strategy documents on the websites, so it is worthwhile looking at this and seeing if you can align the destination bid to a particular strategy or policy area and approach the relevant department for assistance.

Ambassador program - This is a special type of marketing campaign that puts the message in the hands of influencers who will improve your sales, brand recognition, reputation or could initiate the start of a bid for a local area or region. This can be a temporary or long-term partnership. For business events the ambassador may be an advocate for the particular business sector/s relevant to the region or an expert in that field.

Partner programs and pre/post event touring – the first are programs and activities for any accompanying partners coming to the region.They enjoy leisure experiences whilst the other person participates in a business event. This adds to the economic benefit of the event and extends the opportunities for tourism operators to be part of the bid and adds value to the proposal. Partner programs are usually private group opportunities such as winery visits, garden tours, escorted walks, special experiences at visitor attractions, etc and can incorporate a range of self-guided activities for times when no tour is planned

Delegate or attendee boosting – this is particularly useful for association conferences when attendees (delegates) are coming from a range of businesses and are either self-funding or being paid for by their business. This is not usually used for events hosted by a single organisation who will be bringing their own team to attend and funding this. Delegate/attendee boosting encourages interest in attending the event in the destination by offering a destination focused experience, eg:

- This may be in the form of a prize drawer offering free of charge experiences in the region to those who register by a certain date
- It can take the form of produce offers, eg: sample the local wine at a discounted rate before you come (limits can be set on the duration or number of bottles etc available).

Collaborating with others - collaborative bids work best when:

- Values align
- There is consistent quality of product and service
- All collaborators are committed to providing information on time and using the agreed format
- There is clear communication and follow up between parties and a desire to retain the connection post bid, whether successful or not
- Interactions with each other are professional
- There is a culture of mutual support and regard.

CREATING A SELLING MINDSET IN THE NON - SALES TEAM MEMBERS

Who is in your sales team?

Everyone who:

- Answers the telephone
- Wears a corporate or branded uniform
- Works behind the scenes but is sometimes seen by the customer
- Processes the invoices
- Represents you at events

And this can also include:

- Those in your networks who recommend you.

Whilst these people may not have a traditional sales role, how they go about their own job will leave an impression to those clients who interact with them. The organisation may have a designated sales team but it is advantageous if all employees feel confident talking to clients and have a strong understanding of what your organisation does, the purpose and range of products and, critically, any unique selling points and what makes you stand out from the competition.

Consultative approach to sales

A consultative approach to sales suits the business events sector as it is focused on providing a tailored response to each client, ie: providing them with the information that suits their particular need rather than a 'one size fits all' approach.

Showcase "money-can't-buy" experiences to demonstrate you're the something different clients are looking for.

Empowering the team who interact and 'sell' to be able to negotiate on price or inclusions is also taking that consultative approach. Business event buyers understand the financial imperative of business, so this doesn't have to be a negotiation downwards; instead consider what extra value you can add rather than applying a discount, eg: better beverage package for the standard price (depending on your margins) or upgraded accommodation for the event manager or key attendee.

This approach will also suit the non-salespeople in your team. This involves simply using the credible expertise the team member has and allowing them to display their excellent knowledge of their own role and your organisation (as above) whilst acting with integrity in their interactions with the client. This allows relationships to be built and will influence how people feel about your brand / organisation. How can this occur? By:

- Interacting with warmth, expertise and professionalism with repeat and prospective clients
- Talking positively about their work, and your services, outside of the workplace
- Taking the opportunities to network by attending industry or other business orientated events where they will likely be asked about the business and preparing their response so they feel confident when in conversation
- Being open to informing customers of current initiatives, products, services on offer in a proactive manner
- Gathering and sharing market intelligence by taking careful notes, using enquiry checklists and noting down conversations with prospective clients
- Keeping accurate records of all sales enquiries and activities using whatever method you use, eg: spreadsheet, database or Customer Relationship Management System (CRM) etc. A CRM is technology for managing all your business relationships and interactions with current customers and potential customers.

What to say after you have said hello?

If staff are nervous about talking with potential clients, it can be helpful to give some words to help them get the conversation started.

The slow pitch – or simply having something to talk about - It is useful to have a short introduction for staff to use when at industry events, or if they are talking with a client they don't know.Eg:
Hello, I'm (*insert name*). I work at (*insert name*) and we are really enjoying our new / updated / changes to our (*insert product our service*). Have you used us before? Let me send you the link to our website. You would be welcome to pop in and see us too. (*smile!*).

Saying the right thing to overcome objections - Most of us are nervous of a hard sale and it's not necessarily the best way for business events where relationship building and collaboration are valued. However, having a few practiced ideas on how to respond can help when a potential client is uncertain whether to book or not, eg:

- *It's more than we wanted to pay* – recommend reconfirming the value and consider if you can add more value rather than discount
- *I'm not ready to decide* – empathise and agree a time to follow up and then keep to that time by making that phone call or sending an email
- *I'm not sure if it really suits our needs* – validate the concerns, ask which areas are troublesome … can you offer an alternative?
- *We usually use X (competitor) for this* - empathise that you're new to them, reassure and offer proof/validation via site inspections, introducing the team and 3rd party recommendations.

Asking for the business or 'closing the sale – It is very useful to summarise your understanding of the client's needs and then seek agreement or confirmation from them, eg:

- Let's go over what you've told me so far …
- Have I answered all your questions? Do you need any other information?
- It looks like X will work well for you
- Shall I hold space for you now?
- Are you ready to confirm this now?
- I can confirm this for you now
- I can organise the contract for you today
- How would you like to move ahead with this?
- Are you ready to book this now?

In the business event sector, a helpful attitude and professionalism sells more long-term than discounts, offers and give-aways. Practicing the language (have a script if you need it) does help everyone in the team feel confident about talking with clients about their event needs.

Getting the client to experience your product is ideal – site inspections, famils, showcases, video, etc will all help sell your product. Building event networks within your own community and across other businesses will also help you garner recommendations and supportive colleagues. The next section will provide guidance on managing the site inspection by a client effectively.

Having a checklist when conducting sales calls or responding to sales enquiries can be helpful for less
experienced team members, see the guide to this called *Sales Calls Checklist*

SITE INSPECTIONS - SUCCESSFUL HOSTING

Site inspections are an important tool in selling your organisation and getting to know the potential client better. Most event buyers will want to inspect the property before confirming any booking. Inviting anyone interested in using your business to inspect the venue, product or service is a great way for them to see the range of what you can offer and allows you to showcase this. It is also the start to building a productive business relationship.   A well organised site inspection gives your organisation a better chance of winning the business.

Site inspections are an important tool
to sell your organisation first-hand with a client.

A site inspection from the buyer's perspective

Your event buyer may come with their own checklist to confirm that all their event needs can be met at your operation. The most common things they are looking for are:

- **Location / accessibility** – checking you are easy to find (so attendees can also find the location) and it is accessible to all (eg: available ramps etc)
- **Capacity** – they will check that the space is big enough to deliver a quality event
- **Audio visual (AV) capacity** – they will be checking that suitable AV is available and will ideally meet the AV team
- **Food and beverage** – all events need food and the buyer may be pleased to be offered lunch (if they have time) or at least a coffee and snack; this gives them a chance to sample the food choices
- **Amenities** – this includes bathroom facilities, parking, loading dock for deliveries, space for registration or any other service offerings that the event may use
- **Features, ambiance, décor and quality of the venue, product or service** – they will check these meet their needs and is of a suitable standard for the event so well decorated spaces and up to date maintenance is important
- **Checking when they can gain access before the event** (bump in) and when they will need to have all their items, etc cleared out (bump out)

Bear this in mind and ensure that they can have access to all parts of the building or products or services they will use and can also spend time with any key team members for their advice, eg: Chefs and Audio Visual staff.   For a particularly valuable event, you may want them meet senior staff as well for the additional welcome.

Preparing for a site inspection

A site inspection also gives you the opportunity to get to know the client and form the start of what will, hopefully, be a productive and mutually beneficial business relationship. Understanding the client's needs before the arrive is important. If you have already provided a proposal then the site inspection will be an opportunity for you to confirm the requirements and your capacity to provide them. *See Site Inspection Checklist.*

Managing the site inspection

Before the site inspection – confirming the arrangements

- Book the site inspection with the client, checking first that space is available for them to view. Take time to get to know them and their preferences.This also gives you the chance to:
  - Ask what previous properties they have used
  - Ask what aspects they liked and the challenges they faced
  - Discover the things that are most important to them so this can be highlighted in the site inspection
  - Ask if there any concerns or objections regarding your property, so this can be addressed with them during their visit
- Confirm that department staff who need to meet the client are available and ensure it is in their diaries to make sure they are available and attend
- Confirmation telephone call to client (reminder) with follow up email 24 hours before the site inspection; this is a courtesy and is best phrased as 'looking forward to meeting you and showing you our lovely property'
- Provide appropriate directions to the venue including parking options especially if you are located in an area unknown to the client
  - If you have your own car park, book them a named spot and let them know to look for this – it's guaranteed to be much appreciated
- Confirm where to meet at the venue (eg: reception, lobby, etc) and name of person hosting the site inspection (which is ideally the person sending the email as this is friendly and helps to build the personal connection).Add contact details in case the client is running late or needs to contact you.

Before the site inspection – review the proposal and the client's needs

- Review the proposal and make sure you feel up to date and fully conversant with the proposal contents
- Check that all relevant departments and any senior team members are available and have diarised the meeting as you don't want to be embarrassed if someone is suddenly unavailable
  - It suggests the venue really wants the business if a Sales Director or other senior team member is available to say hello, even if they are not participating in the site inspection
- Provide departments with copy of the proposal or key aspects of it so they too are informed of the client's needs and can discuss these with them efficiently
- Alert reception and front of house team and other staff on duty that the site inspection is occurring so they can greet the client by name and welcome them and also just in case the client is early.

Before the inspection – getting collateral for the client

- Prepare a printed copy of the proposal for the client plus room layouts, capacity charts etc so these can be used during the inspection
- Gather any other marketing collateral about your own or supplier services that might help the client understand the breadth of what you are offering for their event
- Consider gathering regional gift/s for the client that will help them remember the venue; this is a much appreciated touch, especially if the gift has a strong regional connection and it helps the client remember their visit.

Before the site inspection – plan the visit

- Plan which rooms you will show in which order to show venue at its best
  - This allows you to confirm they are free and can be made ready for the site inspection
- Particularly good rooms/spaces should start and end the tour as first impressions are important but the space presented last is often the one that has the greatest impact, so save the wow factor for the end.

Before the site inspection – prepare the venue

- Prepare rooms that you will show to the client – this should include alternatives if possible. They should, of course be:
  - Clean
  - Set for a business event
  - Have lights on and any blinds up
  - Have ambient temperature suitable for the conditions
  - Have AV on with a 'welcome' and client logo on screen if you can

- If possible, prepare any other rooms that might suit the client if perhaps the original choices seem less appealing than you hoped
- Check the keys work and the rooms are perfect before the client arrives, just in case something has happened (air conditioning gone off, someone switched off the AV, etc). This will avoid you looking unprepared if something has gone awry.

At the site inspection – meet and greet

- Be in the lobby / reception area at least 5 minutes before the client is due to arrive so you can welcome them to the property; this is a much warmer welcome than having the receptionist call you when they arrive
- If relevant, ensure that other team members (eg: AV, Catering) who have provided information for the proposal are also available to meet and greet
- Welcome professionally, confirm how long they have for the site inspection and check if they need amenities or a drink
    - A welcome drink on arrival is a great touch.

At the site inspection – conduct the site inspection and answer questions

- Show all meeting rooms, best ones first and last for that wow factor and lasting impression
- Explain the benefits and features of each space with particular reference to the client's event and how the space will meet their requirements
- Meet audio-visual team (if on site and relevant) to discuss requirements – this is important as the client needs to be confident that the equipment is appropriate for their event
    - If AV expert is not available, ensure the person conducting the site inspection is well informed
- Meet catering team (if on site and relevant) to discuss requirements
    - If chef is not available, ensure the person conducting the site inspection is well informed
- Show any recreation and outdoor space particularly if it can be used for social functions, morning teas etc
- Show any accommodation with a range of room types if you have them
- Highlight unique selling points (USP) and special features of the venue that add value or are especially relevant to the client's event
- Introduce client to any team members they encounter whose function will be needed for client's event. Say hello to any other team members encountered during the inspection
    - This helps the client recognise you are a connected and collaborative team

- Ask if the client needs other information on the greater area and note what information you can source or assist them in finding (eg: transport, tourism or other activities)
- Ensure senior management have met the client if expected to do so.

At the site inspection – concluding the visit

- Offer refreshments at least, eg: coffee, tea, water or, if relevant time, lunch to go over proposal and answer any further questions
- If possible, add another wow factor, such as Chef designed canapes or dessert over coffee/lunch and, if restaurant has a view, ensure best table used
- Go over the proposal with the client confirming all requirements are unchanged or noting any variations. Answer questions and ensure the client has all the information they need and has seen everything in the venue they want to inspect
- Ensure the client has any additional collateral prepared and gift if relevant
- Ask the client if they would like to hold the space (if not already held) and when they will be ready to make a decision.

After the site inspection – the follow up

- On the day of the site inspection, send a follow-up email thanking the client for their time and reconfirming key points made during the inspection
- Include promised information or let them know when it will be available
- Diarise when to follow up again to seek a decision; this may be informed by discussion with client but if not, follow up one week later.

A few further tips:

- Use the opportunity to build rapport with the client – it is fine to share some personal information, but be guided by the client responses and ensure this is appropriate
- Listen carefully as this will let you fully understand the client's needs and their true preferences
- Note any spaces the client especially likes or comments on so you can highlight their interest in the follow up email and subsequent conversations
- If they show any concerns about an area, try to ask probing and open questions to find out more so you can address this or provide an alternative suggestion.

CONTRACTS AND TERMS AND CONDITIONS

Most organisations have a standard contract for bookings and it is useful to ensure that any you use are fit for purpose.

The biggest contract risk is not having a contract. Ensure all your clients sign a contract, even the most loyal or longest serving ones. A poorly written contract is also problematic as this is a legally binding document so make sure it will stand up to scrutiny. Ask a legally qualified person to provide you with a general event contract or seek assistance from reputable source (eg: a lawyer).

This section does not replace the need for legal advice but offers some information on standard inclusions in business events contracts.

The biggest risk is not having a contract.

Contract inclusions:

Services to be provided – include full details of all aspects of the service, eg:

- Rooms to be used, for what duration
- Set up requirements for each space
- Bump in and bump out requirements
- Audio Visual equipment
- Catering requirements
- Dates for final numbers and implications for payment, eg when prices will not change if numbers go down

Payment schedule – include:

- Initial deposit to hold space or get you working on their event
  - Nobody expects services to be started until a deposit is received
- Itemise each costing and ensure you break down big items (eg: equipment, catering, AV)
- Payment schedule may work for larger events or for those who are unsure of, or relying on, attendee registrations
  - This is common with associations and some groups who may not have large bank accounts to underwrite the cost of the event and therefore appreciate this level of flexibility

- Final payment usually before event (with caveat of last minute extras being a supplementary invoice)
- Know who is allowed to sign for extras on the day on client's behalf

Cancellation or postponement may be by the client or by you and can include:
By the client:

- Ability for you to hold deposit, but this can be negotiable especially in situations outside of the client's control, eg: Covid 19
- Any expenses incurred already can be charged for, so state that client is responsible for event costs incurred in the contract
  - Eg: payments made to third party suppliers
- Postponement charges can be applied, these will cover work you have done yourself;be realistic as you want the client to return
- Cancellation schedule is usually a sliding scale depending on how close to event day; you need to determine what costs you are likely to have incurred to work this out.

By you:

- If there may be times when you think you may need to back out, (eg: a contract giving another client priority at a certain time) then this needs to go into the contract
  - You would need to reimburse client or find alternative for them
  - Finding alternative is quite common in hotel industry when over booking issues arise.

Termination clauses - This is when there is an unforeseen event outside of everyone's control – this has become more common in the past couple of years (eg: Covid-19 was an obvious termination clause).

A termination clause should not be confused with the terms of cancellation. Termination pertains to cancellation due to unforeseeable events that are beyond party's control. This may include weather-related incidents, a government shutdown, a pandemic, or another disaster. A termination clause outlines the scenarios where neither party can be held liable. Of course, these scenarios are highly unlikely, but crazy things can happen out of the blue! You need to protect yourself in your contract.

Changes - this sometimes happens when numbers fluctuate or client's needs change

- Decide when you need final numbers (especially relevant for catering). Most venue asks for this between 1 or 2 weeks prior to the event date for complex catering and between 3 days to 1 week for simpler menus (eg: morning or afternoon tea only).
- Decide at what date (or number of days before the event) a client can only increase numbers but not decrease them

  - Ie: they pay for the higher number even if less arrive (this to protect you if you have incurred expenses).

Indemnification

- Protect yourself from liability due to a client's negligence from accidents that resulted outside of your control if you are sued by a third party
  - Eg: damage caused to a third party suppliers' property or injury to a guest

Disputes – sometimes occur but infrequently and it is usual to specify what will happen if there is dispute, eg: mediation and/or which jurisdiction applies.

Photo release - this is useful if you want to use fabulous pictures of the event to showcase your business when promoting/marketing elsewhere.

Other terms and conditions

Other standard terms and conditions include:

- **Labour surcharges –** which may apply if award rates require staff to be paid differently after midnight, or on public holidays or weekends.
- **Food consumption –** a reminder that only food provided by a venue may be consumed at the venue unless by prior arrangement (eg: special cakes etc).
- **Band meals –** if relevant and based on the Musicians Award which stipulates that all entertainers must be provided with a meal. It is usual to charge this to the client.
- **Displays/signage –** stipulate what may or may not be attached to walls, doors or other infrastructure.
- **Lost property or goods left behind after the event –** it is usual to not take responsibility for these items.
- **Compliance –** it is also usual to include a clause to allow you to insist that all attendees and organisers conduct themselves in an orderly manner and reserve the right to exclude anyone who does not.
- **Contractors –** it is usual to induct contractors on arrival or have them complete an induction before coming on site; it is also usual to ask them to have appropriate licences and insurances.
- **Equipment set up -** include the need for any equipment to be set up at the times and by the organisation agreed in advance and that electrical equipment should have a current test tag.
- **Non-smoking –** include notice of any non-smoking requirements and that it is the client's responsibility to pass this information on to event attendees.
- **Special effects or decorations –** it is usual to only permit these by prior agreement.

See Sample Terms and Conditions

SUMMARY OF TEMPLATES AND CHECKLISTS

Client Enquiry Form template

Proposal template

Sales Call checklist

Site inspection checklist

Sample Cost breakdown

Sample Terms and Conditions

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