Planners 101: A Hotelier’s Guide
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Enhance your event planner relationships with Cvent.

Cvent bridges the gap between the hospitality industry and meeting and event planners who want to create the best experiences for their attendees. Developing a relationship with planners — and understanding their unique needs and limitations — can pay off in big ways for hotels, convention and visitors bureaus, and destination management organisations. And we’re here to help.

We have identified seven main types of planners based on their employers and the types of events they plan. Understanding the roles, challenges, and motivations of each planner type can help you respond swiftly to RFPs, cater to their specific needs, and ultimately secure more bookings and gain repeat business.

Ready? Let’s meet the planners.
Entreprise planners work for companies and corporations with large numbers of employees, planning brand-worthy, large-scale events while navigating corporate hierarchies, proving return on investment, and justifying costs.
Job Function

- Responsible for all event logistics from planning to execution, including securing venues, vendors, and partners.
- Meet attendance goals, manage registrations, and staff events.
- Track and analyse key metrics.
- Provide feedback and regular reports to stakeholders.
- Demonstrate event ROI.

Motivations and Goals

- Bring a recognised brand name to life.
- Deliver successful events within budget.
- Provide a positive ROI — and prove it.
- Achieve objective measures of success.
- Achieve high attendee and stakeholder satisfaction.
- Drive business objectives and attract revenue from sponsors and exhibitors.

Types of Events

- Conferences
- Trade Shows
- Seminars
- Customer Events
- Incentives
- Trainings
- Webinars
- Internal Meetings
Challenges

• The need to prove ROI and justify event costs year over year.
• Lack of visibility and control across the company.
• Aligning event goals and promotion with sales and marketing teams.
• Manual processes that are especially time-consuming for large-scale events.
• The complexities of managing projects across multiple venues and destinations.
• Increasing expectations from stakeholders and attendees.
• The need to provide data on demand.

How to Improve Your Relationship with Them

Be prompt in your responses and provide accurate, up-to-date information from the beginning. Make sure profiles on sourcing platforms are truthful to avoid wasting the planner’s time — and yours — on RFPs for events that are too big for your property. Be willing to help provide the information planners need to prove ROI and justify event costs.
Facts and Figures from the 2018 EMEA Planner Sourcing Report

Number of Events Planned Each Year by Corporate Planners

- 31% of corporate planners said their budget increased from last year.
- 9% of corporate planners said their budget decreased from last year.
- 21% of corporate planners said their budget stayed the same.
- 24% of corporate planners said their budget decreased from last year.

36% of corporate planners said their budget increased from last year.

What They Say

“Price is normally a huge deciding factor, and we tend to have very specific ideas in mind. Venues often want to impose their own rules that don’t suit us — for instance, using their catering company or in-house tech support.”

—Corporate Planner in the U.K.

“I physically go to experience shortlisted hotels. First impressions last, and venues don’t seem prepared to use this research phase as a true marketing investment opportunity. Few will invite me to experience the venue at no cost. I’m comfortable paying but don’t think one should.”

—Corporate Planner in South Africa
The Full-Time Corporate Planner

Full-time corporate planners handle the planning and execution of many different meetings and events. They are often strapped for time and face pressure from internal stakeholders and event delegates to deliver successful events.
Job Function

- Manage event logistics such as site selection, décor, food and beverage, entertainment, and audiovisual equipment.
- Manage delegate lists, coordinate marketing communications, and manage registrations.
- Develop relationships with exhibitors and sponsors.
- Provide feedback and regular reports to stakeholders.

Motivations and Goals

- Increase brand awareness, event registration, and attendance.
- Create efficient, repeatable, and scalable planning processes.
- Deliver successful events on or under budget.
- Properly allocate resources and maximise ROI.
- Educate customers and prospects on company offerings to improve pipeline.
- Achieve high delegate and stakeholder satisfaction.

Types of Events

INTERNAL MEETINGS AND EVENTS
INCENTIVES • TRAININGS • CONFERENCES
TRADE SHOWS • CUSTOMER EVENTS
Challenges

- Organising multiple events at the same time.
- Limited event budgets and resources.
- Time-consuming, manual processes.
- Information in disparate systems and formats, making it difficult to track and compare overall success of events program.
- Increased expectations from internal stakeholders and executives
- Delegates’ desire for smoother, more engaging experiences.

How to Improve Your Relationship with Them

Promptly respond to requests with up-to-date information. Make sure proposals are clear and thorough, and contain all the requested information. Be understanding of budget limitations and stakeholder requirements, and offer creative solutions whenever possible.
What They Say

“We’re planning an event where we’re improving attendee interaction by having a social media wall, one-on-one appointments that can be booked via our mobile app, a live stream to the networking area of the plenary room, and interactive voting and Q&A from the app, as well as live broadcasting online as a webinar.”

—Corporate Planner in the U.K.

“Researching venues takes up most of our time. In some countries, we have difficulty finding a venue that will cover almost all the standards of our meetings, in terms of capacity, location, and categorisation.”

—Corporate Planner in Greece
The Occasional/Part-Time Corporate Planner

Part-time or occasional corporate planners handle the planning and execution of meetings and events as just one aspect of their jobs.
Job Function

- Often work as executive assistants or in the marketing department.
- Plan small company and office events.
- Support others with projects on an ad hoc basis.

Motivations and Goals

- Plan and execute successful events, often with a very short timeline.
- Involve others and solicit input as needed.
- Increase event registration and attendance.
- Achieve high delegate and stakeholder satisfaction.

Challenges

- Managing event planning and execution along with other job duties.
- Often less experience in event planning.
- Limited budgets and resources.

Types of Events

INTERNAL MEETINGS & EVENTS • INCENTIVES TRAININGS
CONFERENCES • TRADE SHOWS CUSTOMER EVENTS
How to Improve Your Relationship with Them

Be responsive. Understand that this isn’t their full-time job, and they might not have as much experience planning an event as others do. Give them guidance, references, and creative solutions, as they likely don’t have the vendor connections of full-time planners. Be transparent about costs, options, and your property’s ability to accommodate their event.

Facts and Figures from the 2018 EMEA Planner Sourcing Report

Top factors that would prevent the planner from returning to a venue:

- Venue variety
- Limited ability to support networking or experiential activities
- Location of venue

What They Say

“We didn’t return to a venue because they didn’t deliver what was agreed upon at the beginning and were not very good at communicating any problems that arose. Therefore, I didn’t find out there was an issue until the day of the event.”

—Occasional Planner in the U.K.

“A large event at a London venue had lots of theming and experiential activities for the guests. The venue gave us the freedom to really make the event our own.”

—Occasional Planner in the U.K.
The Association Planner

Association planners organise events for not-for-profit and national organisations of fewer than 10,000 members.
Job Function

- Negotiate contracts with hotel and vendors.
- Manage registration, speakers, vendors (catering, housing, tours, special events, audiovisual, etc.), and travel.
- Handle onsite logistics and coordination.
- Participate in marketing campaigns.
- Solicit donations of event products and services.

Motivations and Goals

- Increase delegate/member satisfaction.
- Supply stakeholders with numbers/reporting when requested.
- Increase attendance and sponsorship to achieve operating revenue.
- Operate efficiently with limited resources and budget.
- Further the mission of the organisation.

Types of Events

CONFERENCES • SEMINARS • TRAININGS
TRADE SHOWS • FUNDRAISERS • MEMBER EVENTS
Challenges

• Wearing many hats while budgeting, planning, and executing multiple events at a time.
• Limited human and monetary resources to help promote and run events.
• Getting approval of often large boards for events and projects.
• Lost efficiencies with disparate systems (e.g., having to enter data into multiple systems).
• Working with and meeting the expectations of multiple stakeholders.

How to Improve Your Relationship with Them

Make sure to be thorough and transparent in your proposals. Be understanding of their budget limitations. Be creative in how you can help them — if you can’t give a better price, offer help with marketing or throw in additional amenities, for example.
What They Say

“As an organisation we have very specific needs for our visually impaired guests. Getting answers to questions can sometimes be problematic and some venues do not know the law on disability or they choose not too.”

—Association Planner in the U.K.

“I had a training in a venue in Lagos, and i was impressed with their level of good customer service. The hall was neat and the smiles on the faces of every staff member i passed was heart warming.”

—Association Planner in Nigeria

Facts and Figures from the 2018 EMEA Planner Sourcing Report

Types of Events Planned

- Conferences: 27%
- Seminars: 23%
- Trainings: 23%
- Trade Shows: 16%
- Fundraisers: 11%

Over 1/3 say that while responding to RFPs, hotels could improve their trustworthiness in meeting and exceeding expectations.
Social planners are a varied group, with functions that range from wedding parties to networking events. Each planner has different goals and limitations.
Job Function

- Negotiate contracts with hotel and vendors.
- Manage registration, speakers, vendors (catering, housing, tours, special events, audiovisual, etc.), and travel.
- Handle onsite logistics and coordination.
- Manage delegate lists, coordinate marketing communications, and manage registrations.

Motivations and Goals

- Host successful, meaningful events within budget.
- Implement cost-saving measures wherever possible.
- Create memorable, bespoke experiences even for broad audiences.
- Increase reach, recruitment, endowment, engagement, community, and/or revenue.

Types of Events

- WEDDINGS
- CONFERENCES
- NETWORKING
- FUNDRAISERS
Challenges

- Tight budget restrictions.
- Trying to negotiate complicated contracts, often with very specific requirements and hidden fees.
- Lack of responsiveness from hotel sales staff.
- Relying on time-consuming, inaccurate, disparate systems that don’t interact with one another.
- Navigating administrative/managerial restrictions.
- Ensuring that venue is sufficiently accessible for attendees with disabilities and meets specific needs for menu selection, portion sizes, and event space.
- Lack of data security.

How to Improve Your Relationship with Them

Keep contracts easy to understand, with no hidden fees. Be cognizant of limited budgets, mobility requirements, and other sensitivities. Don’t hesitate to offer creative suggestions in order to provide the best value.
What They Say

“Liaising back and forth can be a very time consuming task an may lead to no luck at all.”
—Education Planner in South Africa

“The last Christmas party was amazing for so many reasons: great venue, the theme worked, great food, music, and everyone loved it. I never plan the same thing twice, though, so this year has to be even better.”
—Social Planner in the U.K.

Unprofessionalism and lack of responsiveness of hotel sales staff has a big effect on planners’ decision not to return to a venue.

Facts and Figures from the 2018 EMEA Planner Sourcing Report

Ages of Social Planners

- 18-34 years old: 64%
- 35-52 years old: 32%
- 53-64 years old: 1%
- 65+ years: 2%

Preferred Types of Venues According to Social Planners

- Standard Chain Hotel: 29%
- Unique Venues: 26%
- Independent/Boutique Hotel: 21%
- Cultural Venues: 19%
- Sports Venues: 5%
The Government Planner

Government planners work at a local, national, or international level to plan and execute meetings and events. They face heavy restrictions when it comes to budget, vendor and site approval, and data security.
Job Function

• Manage all aspects of meeting and event planning.
• Negotiate contracts with hotel and vendors.
• Manage registration, speakers, vendors (catering, housing, tours, special events, audiovisual, etc.), and travel.
• Handle onsite logistics and coordination.
• Manage delegate lists, coordinate marketing communications, and manage registrations.

Motivations and Goals

• Organise a successful event.
• Operate within budget and vendor/site limitations.
• Meet stakeholders’ expectations and allow them to be heard.
• Carry out the mission of the department.

Types of Events

MEETINGS • CONFERENCES • SEMINARS
EXECUTIVE EVENTS • TRAININGS
Challenges

• Limited budgets.
• Government restrictions on vendors and venues that can be used.
• Time-consuming, complicated processes to receive approvals from superiors.
• Non-automated, often antiquated systems that don’t interact with one another.
• Lack of data security.

How to Improve Your Relationship with Them

Understand the restrictions government planners must work under and be flexible. Offer solutions and ideas they might not have thought of. Be patient when waiting for answers and bookings.
What They Say

“Our most memorable event was an official U.S. and European Union meeting. There are a lot of rules to follow with the government that made it challenging, but it’s interesting to work with so many foreign delegates.”

—Corporate Planner in the U.S.

“I do mostly government contracts, and they have very specific clauses that some hotels will not accept.”

—Third-Party Planner in the U.S.
Third-party planners (TPPs) are professionals accomplished at organising all types of functions for all types of clients. They leverage industry relationships and purchasing power to secure better availability and pricing. Gaining the loyalty of a TPP can mean the booking of countless events for a hotel.
Job Function

- Responsibilities range from sourcing only to complete, high-security event management.
- Do the heavy lifting for clients who do not have the time, resources or man power to plan events from start to finish.
- Research, evaluate, and present ideal options.
- Send out RFPs, track down answers, follow up with hotels and vendors, and manage entire process.

Motivations and Goals

- Satisfy and exceed clients’ expectations.
- Provide a stellar experience for clients and delegates.
- Maximize time when working with multiple clients at the same time.

Types of Events

ANYTHING AND EVERYTHING
Challenges

• Negotiating with venues.
• Managing multiple clients and events of all kinds.
• Answering to both internal bosses and demanding clients.
• Non-automated or antiquated systems.

How to Improve Your Relationship with Them

Share information on the channels third-party planners prefer (industry websites, blogs, social media), as well as at trade shows, networking events, and other industry meetings. Understand that third-party planners are restricted by their clients’ budgets and wishes. Respond quickly with complete, accurate information in the requested format. Always offer alternative dates if the planner indicates flexibility. Be consistent in negotiations on price and amenities.
What They Say

“Many hotels don’t fully read or respond to the RFP. They don’t seem to understand the information and material that agencies need, such as the number of rooms in each category.”

—Third-Party Planner in Swaziland

“It’s always important for us that the venue is flexible and will negotiate with us and will try and meet the client’s needs as best as possible.”

—Third-Party Planner in the U.K.

“For a B2B event I planned in Ibiza, Spain, a compromise was made in choosing a beautiful location even though the venue was not a ‘business-style’ hotel and the conference rooms were not ideal. A lot of creativity made it work wonderfully, and the feedback from the participants was the best I’ve ever had on the three years I managed this event for this company.”

—Third-Party Planner in the U.K.

Facts and Figures from the 2018 EMEA Planner Sourcing Report

The #1 most difficult sourcing stage is negotiating with venues.

The top influences on destination choice are branding, reputation and online reviews.
Planners at a Glance

The Entreprise Planner
- Works for a large corporation with many employees.
- Must track metrics, prove ROI, and justify event costs.
- 36% of corporate planners' budgets increased in 2017.

The Full-Time Corporate Planner
- Handles events ranging from internal meetings to large conferences.
- Frequently deals with limited human and budgetary resources.
- Search engines are a top influencer on sourcing decisions.

The Occasional/Part-Time Corporate Planner
- Often serves as an executive assistant or member of the marketing team.
- Frequently less experienced in planning, sourcing, and negotiating.
- Must manage event planning with other job duties.

The Association Planner
- Works for not-for-profit and national organisations with fewer than 10,000 members.
- Often has very limited budgets.
- Nearly a third say hotels could improve their trustworthiness in submitting their proposals.

The Social Planner
- Varied portfolio of functions, from wedding parties to networking events.
- Complicated contracts are a frequent pain point.
- Most social planners are under the age of 34.

The Government Planner
- Works at the local, national, or international level.
- Faces heavy, time-consuming restrictions on budget, vendor selection, and site approval.
- Data security is a main concern.

The Third-Party Planner
- A professional who works on all types of events for all types of clients.
- Often holds important industry relationships; gaining loyalty can mean repeat business.
- Reports that negotiating with venues is most difficult sourcing stage.
About Cvent

Cvent is the global meeting, event, travel, and hospitality technology leader.

Cvent provides easy-to-use, integrated technology solutions to maximise the impact of meetings and events of all sizes. We help organisations plan and market events, execute onsite, engage audiences, and measure and analyse results.