



**CEM LEARNING
PROGRAM**
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Event Operations



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ABOUT THE CEM LEARNING PROGRAM

This workbook is intended to serve as the student's guide for the CEM Learning Program on Event Operations. It is based upon the Curriculum Blueprint approved by the CEM Commission and much of the content is based on Chapter 21 of *The Art of the Show*, 5th Edition (AOS). While the AOS is not an obligatory CEM Learning Program textbook, it is an additional resource and optional reference for this and other CEM Learning Program courses.

The CEM Learning Program is not a basic introductory course of study. It is designed for adult learners who have accrued at least three years of full-time work experience in the exhibitions and events industry. Its goal is to provide students with enhanced knowledge, skills and insights derived from their interactions with peers who are also learners, from CEM faculty who serve as subject matter experts, and from the readings and exercises that are assigned.

CEM Learning Program courses are available for in-person, virtual and on-demand classes. The content and final exams for each course are the same for all learning options. In-person and virtual students are expected to read the CEM workbook prior to class. Students taking a CEM on-demand course will read the workbook throughout the length of the course.

Students will be tested on the knowledge they acquire from this course. It is important to understand that the information provided in this workbook may differ from the practices and experiences of each student.

The examination is made up of 40 multiple-choice and true/false questions. To pass the examination, a student must achieve a score of at least 30 out of 40. CEM faculty do not have access to the CEM exams, nor are they aware of any questions that may appear on each examination. Exam questions are based only on information contained in this course workbook (Appendix is not included).

Throughout this workbook, the terms "exhibition manager", "show organizer" and "exhibition organizer" are used interchangeably. Their meanings are the same - the individual who is responsible for overseeing the planning, management and execution of an exhibition.

Since general business fundamentals apply to multiple aspects of exhibition management, core concepts relevant to more than one course topic may appear in several learning courses. Students with little or no foundation in marketing and finance are encouraged to take the Event Marketing and/or Finance, Budgeting and Contracts courses early in the course of their CEM Learning Program studies.

Key terms are identified in this module by bold face type and accompanied by a definition. Those noted with an asterisk (*) are from the Events Industry Glossary developed by the Events Industry Council (<https://insights.eventscouncil.org/Industry-glossary>).

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LEARNING OBJECTIVES

Upon completion of this course, the learner should be able to:

- Identify teams for event
- Develop project timelines for key stakeholders
- Establish roles and responsibilities for all stakeholders from pre-event through post-event
- Develop a plan to manage the exhibition operations from pre-event through post-event
- Explain components of on-site communication
- Establish show rules and regulations and their enforcement on-site
- Identify the exhibition cycle phases
- Conduct a post-event analysis



OVERVIEW OF EVENT OPERATIONS

Exhibition management is, to many, a logistical science. The multitude of details – the facts, the figures, the planning – must be addressed within a logical, sequential framework to realize a successful exhibition. To others, exhibition management is primarily centered on people, bringing the buyers and sellers of the industry together. The daily interaction with contractors, attendees, exhibitors, and staff requires a high level of effective communication skills. After months of planning with various teams, everything culminates with the arrival of the onsite management team.

Throughout the planning cycle, the exhibition and event requirements are gathered and interpreted by the exhibition organizer from a complex matrix of stakeholders including exhibition sales, marketing, exhibitors, attendees, and executive management. Plans and specifications are developed and fulfilled by a network of contractors, staff, and venue personnel. The exhibition organizer coordinates, manages, and monitors all activities that create the environment and ensures the overall success of the exhibition from the beginning at move-in, through on-site to the end at move-out.



PRE-SHOW - TEAMS

EXHIBITION ORGANIZER AS THE TEAM LEADER

There are many moving parts to organizing an event and the exhibition organizer wears many hats. These hats can include coach, motivator, mediator, teacher, and project manager.

Successful exhibition organizers must surround themselves with the absolute best team to execute an exhibition. A notable quote to keep in mind is: *A Team is Only as Strong as Its Weakest Player.*

TOP TEAM LEADERSHIP SKILLS

Strong team leaders possess several skills to effectively and positively interact with their team to achieve a shared goal. In some cases, these skills come naturally, while others can be learned through experience and formal training. Team members look to those in leadership roles to guide and support them, facilitate communication, and motivate them to achieve their goals. Strong leadership cultivates a stronger team, a more positive work environment, and enhanced productivity.

The top skills of a strong team leader are communication, inclusivity, honesty, relationship building, decisiveness, innovation, responsibility, and motivation.

UNDERSTANDING LEADERSHIP STYLE

To improve leadership skills, the exhibition organizer should think of how they will respond to certain situations. For instance, do they rely on themselves to make decisions or is their decision based on input from others. The organizer may believe in nurturing the unique skill sets of each team member rather than forcing everyone to aim for the same goals. This can provide insight into how they prefer to lead.

There are different leadership quizzes to determine the preferred style of leading that can be found on the Internet. There are also ways to improve leadership skills by attending educational events focused on leadership development such as IAEE Women's Leadership Forum, the IAEE Leadership Institute and IAEE webinars.

If one is starting out in their career as an exhibition organizer, consider seeking out a mentor to help guide that leadership journey.


THE TEAM LEADER'S ROLE

The role of the team leader is to ensure that common management plans used by businesses are followed. Common management plans include the company or show's **strategic plan**, **business plan**, **project management plan** and **marketing plan**.

The strategic plan is focused on a vision or other significant concept and is used to direct management decisions for that company.

The business plan describes the business and its internal organization of resources, products or services, customers, and potential market niche and share. The business plan is utilized to establish or reorganize a business and to solicit funding.

The project management plan guides a specific project from concept to delivery and focuses on the project team capabilities, resources, and deliverables.



The marketing plan is used to guide marketing staff activities and use of resources and measurement of achievement. The marketing plan is based on sound goals and objectives set specifically for a business and should align with the strategic plan for the company.

The project management plan will be the focus of this course.

PROJECT MANAGER

As mentioned earlier, exhibition organizers wear the hat of a project manager. A **project** is planned work that has a specific purpose and usually requires an extended period to complete. A **project manager (PM)**, who in many event planning organizations is the exhibition manager, leads an exhibition team or could operate independently to plan and manage a successful event.

The PM manages relationships between project team members, between the team and senior management, and between the team and project stakeholders, whether internal or external to the exhibition host organization. While PMs may have management and technical skills, they may have a full-time position managing the relationships specified for an exhibition. In that case, the PM would work closely with various teams in the exhibition host organization including the event planning team.

The ultimate role of project management is to plan, execute and finalize projects according to the purposes, goals and scope that have been established by deadlines and budgets. The PM coordinates the efforts of team members and contractors.

FIVE PROJECT MANAGEMENT PHASES

When considering event planning teams, it is important to be familiar with the five phases of project management to ensure overall project success:

1. **Initiating phase** - the exhibition is formally established.
2. **Planning phase** - follows the formal affirmative decision for the management of an exhibition.
3. **Executing phase** - process of completing the work defined in the project plan which satisfies the project specifications.
4. **Monitoring and controlling phase** - occurs simultaneously during both the planning and execution phases of a project; planning and executing are measured by monitoring task completion, on time and within the established budget.
5. **Closing phase** - includes the exhibition's actual completion, recognition or approval by the exhibition organizer and an analysis of the success (or failure) in achieving (or not achieving) objectives by the team.

In managing teams, it is important to provide clear direction, and constantly monitor for milestones and project updates. Also, selecting the right tools to communicate and meet guidelines is critical.

What will the method or methods be for sharing information with all stakeholders, including vendors? Dropbox and Google Docs are examples of possible options.

To get a more in-depth understanding of the processes involved in strategic planning and project management, it is suggested the learner take the CEM course titled Strategic Planning and Management.



TEAM DYNAMICS

Exhibition organizers cannot perform all the necessary tasks to produce an exhibition on their own. They need to have a team. A **team** is a group of individuals, all working together for a common purpose. Ideally, the individuals comprising a team should have common goals and objectives and think along the same lines. It is crucial for show organizer leads to continue to provide clear goals and objectives to team members along the way.

There is a difference between a group of people coming together vs. a team. A group is not necessarily a team. A group can have individuals with varied interests and attitudes as well as thought processes. It is not necessary that the group members have a common objective or a common goal to achieve. It is the role of the exhibition organizer to help create a team environment through specific goals and objectives.

DEFINING PROJECT TEAMS FROM THE BEGINNING

The exhibition organizer's role is to determine what teams are needed leading up to the event and on-site. Some teams will be strictly responsible for the pre-planning of activities, some will be responsible for only on-site activities, and others will be active continuously throughout the event. The team members must complement each other and work in unison. Personal interests must take a back seat and all of them must deliver their level best to achieve the team objective. Team members must not argue amongst themselves or undermine the other members.

Some teams will be comprised of only internal organizational members, others will comprise external members of a planning organization. It is common to have one core internal planning team that carries out the planning all the way through to on-site and execution.

The team size depends on the complexity of the task to be accomplished. Ideally, a team should consist of seven to 10 members. Too many members may lead to confusion and misunderstandings.

EXAMPLES OF PLANNING TEAMS

There are smaller project planning teams that will work behind the scenes, including the exhibition sales team, the exhibition operations team, the conference planning team, which is comprised of those who work with content and speakers, the marketing team, the leadership team, etc.


The show organizer should consider creating one team comprised of one representative from each of the smaller project teams to meet and keep on top of timelines, goals, and objectives.

Each one of the planning teams should have major milestones or deadlines they are expected to meet prior to transitioning to the on-site team. These major milestones could include housing deadlines, registration deadlines, signage orders, booth orders, food and beverage event orders, and more. These pre-event milestones, completed by the planning team, all help direct the onsite execution team.

REMOTE TEAM TIPS

Pre-planning teams may be working in person or remotely. There can be additional challenges in managing remote teams. People working remotely may lack access to information or may not have ready access to files. Team members may feel isolated or could be distracted by things going on at home.

More frequent use of video conferencing to encourage and increase interactions may be helpful.



Implementing rules for virtual engagement may assist in ensuring everyone feels a part of the virtual meetings.

As a project leader, be prepared for possible distractions to team members who may be working from home. Show flexibility when scheduling meetings and be considerate of time zones as people may need to take care of children or be a caregiver for spouses or parents.



PRE-SHOW

Once the exhibition organizer has completed the pre-show work and is ready to move on-site, two things should be in place – the function book and the master staff information guide.

THE FUNCTION BOOK

One way to ensure that any part of the planning and organizing functions is not forgotten is to create an event book, commonly referred to as the event “function book”. An event function book is the exhibition organizers quick reference guide to all aspects of the exhibition, general and specific. In the past, function event books typically took the form of three-ring binders. Now, they are digital or a combination of both.

The basic information contained within the event book is a recap of the information found in the contracts between the exhibition organizer, various service contractors and the facility. The function book should include all the information one might require once on-site.

It is common to have different versions of the function book. The education team, for example, will need meeting room layouts, food and beverage and audio-visual orders for the meeting rooms, and speaker contact information and session information. The sales team will need the floor plans and listing of all exhibitors. The exhibition organizer usually needs all the information to be included. The official service contractor and facility liaison should also have their own versions. Information in the function books will be used in the pre-con meeting which will be discussed later in the workbook.

MASTER STAFF INFORMATION GUIDE

A master staff information guide should be included in the function book for internal staff. This guide should be reviewed before leaving for on-site and updated to include:

- All emergency contact information for staff
- Contact information for vendors
- Venue and local emergency contacts with essential information
- Hotel addresses and phone numbers
- Staff arrival and departure information
- Attire policies or dress code
- Staff meals and times
- Radio/on-site communication rules
- Emergency procedures
- Dates and times for on-site staff meetings and who is required to attend
- Event hours, including move-in, move-out and show hours

Other items that might be included:

- Event orders
- Room layout diagrams
- Audiovisual orders
- Special events

The guide should be noted as confidential and distributed only to appropriate parties.



LAST-MINUTE DETAILS

As with all planning operations, conducting one final review is important before putting plans into action. Questions that should be answered before leaving for show site may include:

- Has the final version of the floor plan been approved by the fire marshal?
- Have the show rules and regulations been distributed?
- Have the requirements been communicated to all suppliers? (For example, audiovisual; food and beverage, etc.).
- Is there proper insurance coverage for the facility, exhibition manager/management and exhibitors?
- Has everything been prepared for the show shipment, with clear delivery instructions?
- If there is a tight move-in or move-out schedule, has that been coordinated with the facility and previous contractor?
- Has the event emergency plan or disaster plan been reviewed?

EXHIBITOR PRE-SHOW ACTIVITIES

Pre-exhibition activities can set the exhibitor up for success at the event and ensure all stages of move-in, exhibition days, and move-out go smoothly. Communication is key. The show organizer can send early customized bulletins after booths are assigned, which can continue until the week prior to the show. Early bulletins serve as a reminder to the exhibitor of task deadlines. The Exhibitor Service Manual (ESM) is generally sent or made available three to six months before the show and contains general even information, labor/service order forms, rules and regulations, and other information to ensure exhibitor success.

Sponsorship Fulfillment

Many show organizers offer sponsorship opportunities to exhibitors in return for recognition and branding at an event. Coordinating with the exhibiting company's representatives may not be a responsibility of the operations team; however, it is likely their responsibility includes ensuring the delivery of the recognition (or "fulfillment").

Logistical issues which may require advance planning and/or extra attention on-site may include:

- Shipping, receiving, storage and distribution of give-away items imprinted with a sponsor's name, such as water bottles or lanyards.
- Ordering signage or banners acknowledging the sponsor.
- Coordinating sponsor visibility with another vendor, such as a shuttle company carrying imprinted headrests or signage on the inside or outside of the vehicle.
- Writing scripts for announcements recognizing a sponsorship at an event, such as the opening of a general session or a special concert or sporting event.
- Assigning complimentary booth space to a sister organization in return for similar space at their event (called a "trade out") or for an event sponsor.
- Arranging for room drops to the attendee/visitor hotel room, if a sponsor agreed to provide an amenity or marketing brochure to each registered guest of the event at the hotel.



ARRIVAL ON-SITE PRIOR TO EVENT

FINAL SITE INSPECTION

The first to arrive on-site and last to leave is the life of an exhibition organizer. On arriving on-site at the actual event, the first priority is a walkthrough of all areas in the facility that will be utilized. A final site inspection should be conducted. If members of the planning team are available, they should join the inspection together with facility representatives and the **official service contractor (OSC)**. Everything should be documented with photos and/or videos.

Checking the condition of the facility is very important. The cleanliness of the facility should be checked, which includes the carpet, walls, and paint, and make special housekeeping or refurbishing requests, if needed.

If possible, the exhibition organizer should look for pre-existing damage to columns, floors, windows, and infrastructure and document with photos or video. Inspect doors, walls, pillars, windows, and docks with a representative from facility management to avoid disagreements over liability for damage.

Ensure that there have been no changes to the infrastructure since the last site visit. Is there a new fire cabinet in the middle of an exhibit space? Has permanent signage been changed? Is there a new concrete wall in the middle of a proposed aisle on the floor plan? Has a lobby been renovated or altered or access to a room closed or blocked?

Always check for things peculiar to the facility. For example, check for icing on ramps and sidewalks if the exhibition is during winter. Ensure there are adequate heaters, etc. in entranceways and loading dock areas. Always ensure that everything at the facility is working correctly.

If the show is held in the same facility year in and year out, the organizer should not become complacent. Things may have changed. Always conduct a final site inspection prior to move-in.

SHOW MANAGEMENT

After arriving on-site, setting up the show management office is also important. The **show management office** serves as the operations center for the event. The show office is preferably a large, secure room conveniently located near the show floor, sometimes on the show floor near the back. This work area should be stocked with basic office supplies, laptops or desktop computers, printing capabilities, and other resources necessary to conduct business. A good practice is to move into the show office early, get organized and implement a pre-established communications network with all key players.


Once the show management office is set up, the show organizer should check in with the OSC executive assigned to the show. Also, check in with other vendors to begin the process of setting up for the event.

The OSC **account executive** assigned to the event can be relied upon to assist show management with the many unanticipated challenges that almost always arise during the run of a show.

As mentioned before, assemble any team members that may be on-site and have them participate in the walkthrough. Ensure they are organized and understand their on-site roles and responsibilities.

REGISTRATION AND OTHER DESIGNATED AREAS

One of the busiest and most needed areas in an exhibition is registration. A final detailed meeting with



the registration contractor is in order if registration is not done in-house. In addition, before moving in and installing the registration area, it is essential to verify that electrical lines, phone, and data lines have been installed correctly and are ready for use. Double-check with the service contractor on the placement of registration and writing counters.

Attention should be focused on security processes, schedules, etc. Meet with the temporary staff manager, temporary (or temp) staff, and any other staff assigned to registration to conduct training. Protocols for admission, entrance and egress points, badging procedures, money handling, transfers, and bank deposit protocols should be reviewed.

Even if the weather is nice, ensure the coat check area is clean and there is an adequate supply of hangers, etc. in the event of inclement weather.

In most cases, there will be other areas of the facility (besides the exhibit hall) that will be used or occupied during the event, such as an education staff room, speaker ready room, and a room for VIP meetings to take place. If the show has a conference component, all meeting rooms will need to be checked. Like all other parts of the building, these should be given a final site inspection before the show move-in to ensure that these locations will be able to function well during the exhibition.

With respect to on-site offices, ensure that the required equipment, furnishings, and supplies have been provided. Do a final walk through with a facility representative to check for damage or missing items. Obtain the necessary desk and office keys. Check to make sure that all electrical outlets are fully operational.

Special event space should also be checked – where are the pick-up and drop-off located? Are those areas well marked with signage? What area is designated for ride share and taxis and are they well-noted? Is there enough parking available for exhibitors and attendees who may be driving?

EXHIBIT SPACE

In addition to offices and meeting space, the exhibition organizer will need to conduct a last-minute review of the floor plan, which should be the same as the one on file with the local fire marshal.


The floor marking grid should be reviewed and the markings confirmed. The aisle sizes should be confirmed. Exhibitors should be advised if fire extinguishers or smoke detectors will be required in their exhibit space due to the nature of their exhibit or products being displayed.

The exhibition organizer should also consult with the OSC to ensure that all the necessary service desks, especially the EAC check-in desk, have been set up and are ready to service exhibitors.

PRE-CON MEETING

At the **pre-con** (pre-convention meeting), the exhibition organizer and core team members meet face-to-face with everyone assigned a significant role in the execution of the exhibition. Attendees generally include the primary event organizer, representatives of the event organizer or host organization, department heads at the facility, other facility staff, as appropriate, and contractors. This meeting provides the opportunity to review any last-minute details, changes, assignments, or special requirements.

A typical pre-con agenda would include:

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1. At the beginning of the meeting all parties present are introduced. To ensure that all parties are correctly briefed and aligned, the show organizer usually will begin the meeting with a short history of the event, an overview of the mission and purpose of the exhibition, any special industry issues that are timely, and what specific goals are to be achieved in the days ahead.
 2. Representatives from the local DMO, primary hotels, key vendors, facility department heads, and the official service contractor then provide an overview of their roles and responsibilities and discuss any issues that may affect other vendors in the room.
 3. After the introductions and overview, there is typically time for smaller breakout discussions between the vendors and the operational representatives.
 4. It is also essential to review the emergency action plan which will be discussed later in the workbook.



ON-SITE OPERATIONS

CORE ON-SITE TEAM MEMBERS

Depending on the type of host organization, the exhibition staff and supporting vendors can range from a few individuals to dozens of people, it and can vary in size during the planning cycle. The exhibition organizer will work most closely on-site with a core exhibition team that includes:

- Key meeting and exhibition staff from the exhibition sponsor
- The OSC's account executive
- The facility's exhibition coordinator, typically with a title such as Convention Services Manager or Coordinator

Some organizations create departments such as "Meetings and Exhibitions" that operate as a unit year-round. In smaller organizations, it is not unusual for one person to be responsible for different functions such as operations and meeting planning or conference development and meeting planning.

Other organizations may draw needed talent into the process on an as needed or part-time basis. Still other organizations **outsource** the exhibition planning and production to a **third-party management company**. All these options are viable depending upon the specific circumstances of the sponsoring organization.

Other staff may be present on-site for various reasons, such as participating in committee meetings or speaking in sessions. They, too, should be included in the distribution of all key communications so that all organization staff is fully briefed.

The sponsoring organization exhibition production team's staff can be organized in various ways. The team usually includes professionals with experience and expertise in sales, marketing, operations, conference development, and/meeting planning.

Some small organizations have few people who wear multiple hats, and larger organizations may have many staff in multiple departments.

ADDITIONAL ON-SITE TEAM MEMBERS

A successful exhibition cannot take place without the involvement and support of different people, groups, and independent contractors. All of their products and services must be carefully coordinated for precise delivery when required. The most common on-site team members are described below.

FLOOR MANAGERS

Show organizers often will secure one or more **floor managers** who will work closely with the OSC on behalf of show management. The role of the floor manager is often outsourced. Typically, one floor manager is assigned for every 150 booths.

A floor manager may be assigned a variety of tasks such as:

- Patrolling the show floor
- Assisting exhibitors in resolving any problems
- Ensuring compliance with all show rules and regulations
- Acting as communications liaison between the show management team and exhibitors



EXCLUSIVE IN-HOUSE SERVICE PROVIDERS

Outside suppliers are acquired and incorporated into the exhibition team. These partners are often referred to as service providers, vendors, contractors, or subcontractors and are critical to the success of any exhibition. In some cases, due to union jurisdictions (primarily in the U.S.) or contractual agreements with the venue, the exhibition organizer is required to use **exclusive providers** in such areas as:

- Food service and catering
- Utilities (electrical, water, gas, Internet, telecommunications)
- Cleaning
- Rigging
- Security
- Emergency Medical Technician (EMT)

Although they can be more expensive and may be more challenging to work with, there are advantages to using exclusive providers. For example, one can expect a higher level of service, and are on-site and available. Exclusive providers can also be added to the master invoice, and the facility can assist when challenges may arrive.

The show organizer must secure the required functions whenever a required service is not defined as a facility exclusive. Upon arrival before the event, it is important to check in with all in-house service providers.

OFFICIAL SERVICE CONTRACTOR (OSC)


As the key contractor for the event, the official service contractor, or OSC, is invested in overseeing many critical functions. The OSC's role is to translate requirements from exhibition management and exhibitors into decorating, signage, and managing other logistics, primarily inside the exhibit hall, on time and correctly. In some countries, the OSC simply marks the show floor, sets up booths/stands and provides furniture for them, while other companies provide signage and other logistics within the exhibit hall.

In the U.S. and Canada specifically, the OSC:

- Schedules the arrival of trucks at the loading dock from the **marshaling yard**
- Manages the traffic arriving at the freight/loading dock with deliveries for the exhibition
- Supervises the unloading of freight and delivery of materials to each booth/stand
- Arranges to store empty crates and other packing materials
- Supervises union labor relations, negotiating periodically with union labor to establish rates and work rules

Other essential items that should be reviewed with the OSC include:

- Floor marking, taping and updating any recent floor plan changes
- Exhibitor order processing and scheduled opening of an Exhibitor Service Center (ESC)
- Coordination of work areas with **Exhibitor Appointed Contractors (EACs)**
- Coordination with specialty contractors for scheduling of **move-in** and **move-out**
- Scheduling and procedures for reviewing and approving signs ordered by the show sponsor (this is especially important if the event involves many complex signs set outside of meeting rooms)

- 
- Status of the early hanging of large signs, graphics, and banners
 - Set-up of sponsor's booth/stand or hospitality area
 - Schedule for cleaning of booths/stands and aisle carpet
 - Target time for completion of laying aisle carpet
 - Rehearsal schedule and staging needs for special events
 - Agreement for the final walkthrough of the event room or exhibition hall

SHIPPING

The exhibition organizer may appoint preferred air and/or ground freight shipping vendors. These companies are responsible for getting the shipments to and from the building and can provide special rates and benefits to the exhibitors. In the U.S. and Canada, once the shipments arrive at the loading dock, the OSC takes over the material handling transfer of the freight from the loading dock to its destination.

In many countries, exhibitions hosting international exhibitors often appoint an official international **freight forwarder** to manage the entry of goods into the country and the move-in and move-out of the exhibitors' freight. A **customs broker** – often, but not always, hired by the freight forwarder – ensures submission of proper documentation for the materials to enter and leave the country legally and expeditiously. In all countries, these vendors are important in assisting with international shipments getting to the show. They also assist with any shipments detained during customs clearing and returned to their country of origin.

FREIGHT


One of the highest operational priorities of any exhibition is the coordination of freight, which includes transport, **material handling** (also known as **drayage**), efficient off-loading or moving from truck to loading dock to exhibitor booths/stands. The following actions should be taken in conjunction with the OSC and/or material handling contractor:

- Inspecting empty crate storage area
- Establishing or reviewing late exhibitor arrival policy
- Reviewing target delivery dates (generally front to back)
- Reviewing traffic patterns in marshaling yard and loading dock
- Establishing security protocols at freight and other loading dock doors
- Reviewing labor schedules for Sunday or holiday delivery hours
- Reviewing the policy concerning deliveries by individual exhibitors (i.e., **POVs** or **privately-owned vehicles**)
- Establishing no-freight aisles (aisles reserved for security, fire and/or safety and pedestrian traffic during move-in and move-out)
- Inspecting the marshaling area

DRAYAGE/MATERIAL HANDLING

Drayage is the same as material handling. It covers services performed by the OSC that include:

- Delivery of exhibit materials from the dock to assigned space
- Removing empty crates
- Returning crates at the end of the event for re-crating
- Delivering materials back to the dock for carrier loading



It is a two-way charge for both incoming and outgoing material.

CONVENTION CENTER OR OTHER FACILITY

The facility's exhibition representative, or convention services manager, is the organizer's key on-site contact. They are responsible for managing all exclusive service functions performed during the event and assisting with requests related to exclusive vendors.

UTILITIES – ELECTRICAL, TELECOMMUNICATIONS AND INTERNET

The convention services manager must be familiar with the wireless and bandwidth capabilities of the facility to plan for the exhibition's required bandwidth and to work with the internal operations team to coordinate installation and removal of utility requirements with vendors.

The exhibition organizer should also be familiar with the facility's bandwidth capacity, checking it against the event's requirements based on past usage and experience, and then rechecking Internet capabilities upon arrival at the venue. This is especially important at exhibitions with large numbers of exhibitors and attendees, many of whom carry multiple wireless devices.

Some venues will bring in additional wireless service boosters for large shows. Knowing the bandwidth capabilities in different countries is also an important consideration.

Organizers should understand how to manage Internet access to avoid lost efficiency, cost overruns, and reduced effectiveness.

FOOD SERVICE AND CATERING

The catering vendor is responsible for meal functions, special receptions, concessions, and staff meals. Catering orders require review on-site and may be adjusted for attendance fluctuations based on projected attendance statistics. In this case, the exhibition organizer works with the catering representative to adjust food orders, seating space, and any other catering-related issues, including special requirements identified during pre-registration.

Requests from attendees or exhibitors involving special dietary needs, based on allergies or religious beliefs, are priorities requiring immediate attention and monitoring.

EXHIBITION SECURITY PROVIDER

The official exhibition security company provides protection and a security presence once the exhibition organizer takes occupancy of the facility. The exhibition representative (or convention services manager) should also be consulted to coordinate perimeter security provided by the facility with any separate services supplied by the official security company.

Before opening, the exhibition organizer and OSC should meet with the security supervisor to finalize guard stations and review the following:

- Exhibition rules and regulations, procedures, and patrol schedules
- Previously identified security concerns
- Emergency procedures and protocols
- Special security requirements requested by exhibitors
- Exhibition entrance requirements and procedures

In addition, a review of badge types required for entry is necessary to ensure that only properly credentialed individuals are allowed access to the exhibit hall. This is also the time to re-confirm with



security personnel the process for recording the number of individuals entering the exhibition.

FIRST AID

An **emergency medical technician** (EMT) or another qualified medical professional should be available during the exhibition, beginning at move-in and concluding when move-out is complete. All key exhibition staff must know the location of the first aid room and how to reach the EMT. The EMT should be provided with a schedule of events, including the times and locations of all functions connected with the exhibition. The EMT should also know the approximate number of participants expected each day in case multiple first aid stations are required.

AUDIOVISUAL (AV)

The on-site audiovisual (AV) provider provides on-site equipment and labor to install pre-ordered services in the show management offices and the exhibition hall, although most venues have in-house paging systems in the exhibit halls.

The exhibition organizer should review pre-ordered audiovisual requests and work closely with the AV representative to ensure that the ordered equipment and set-up time are appropriate and efficient. This responsibility may be delegated to the OSC for service to exhibitors, and the OSC may be the primary individual to respond to additional requests made by the exhibition organizer, particularly in the U.S. Many facilities have in-house sound and visual systems as an exclusive service.

A separate sound system or “plug in” to the house system may be brought into the facility when using a third-party AV company. The exhibition organizer should understand who is providing which services and the process for billing. Unavoidable last-minute changes in speakers, equipment orders and room assignments should be conveyed to the AV contractor.

On-site changes or additions are typically more expensive. One person should be familiar with the organization’s budget and designated to approve or disapprove any additional expenditures, as AV can be a source of significant cost overruns on-site.

The AV vendor may or may not be contracted to supply computer equipment. When a third-party provider is used for computer equipment, a time should be arranged to review and reconfirm orders and to determine the individuals who will provide on-site technology support and timely response to requests from the exhibition organizer.

PHOTOGRAPHER

Show management may want to document the key elements of the event, especially images that capture the unique interactions that often take place between buyers and sellers.

Exhibitors frequently need photos of their exhibits and demonstrations, and photographs showing their success can help to market additional exhibit space. Photos often supplement media releases or news events.

A **shot list** for the photographer provides a schedule of required photographs. It should be created sequentially and contain a description of the required shot, location, and time. Show management should review the details of the shot list with the photographer before the show begins.

The show photographer should be provided with credentials that will allow access to all event venues.



CLEANING AND TRASH REMOVAL

Some facilities include cleaning in their contracts; others require the services of outside contractors, who are typically hired and managed directly by the OSC. Sometimes, the exhibition organizer may designate an official subcontractor for cleaning and trash removal.

Reviewing and reconfirming cleaning schedules with the appropriate parties should be conducted to ensure trash is removed regularly, especially during peak times. Recycling procedures and/or removal of hazardous waste should be monitored throughout the exhibition. Coordination and reconfirmation of the schedule with the security vendor is essential to ensure cleaning personnel can access the required areas of the facility, and so that security can monitor cleaning personnel.

Exhibitors may also have specific cleaning requirements for their booth/stand. In the U.S., these services are generally managed by the OSC, but may also be done through the official building contractor. The preorders for this service should be noted during the review and reconfirmation process.

TRANSPORTATION

Exhibitions utilizing multiple hotels and/or having arranged off-site functions may engage the services of a special contractor to manage the shuttle bus operation. The key contact from the company serves as the liaison with the exhibition organizer for a general shuttle bus operation and with individual exhibitors having off-site functions.

The responsibility for scheduling, signage, and on-time performance must be carefully managed on-site. The exhibition organizer should communicate with the transportation contractor to reconfirm schedules and communicate with the facility representative to ensure enough staff is available for traffic control and VIP assistance.

FLORAL

Either the OSC or the organizer will contract with the designated floral subcontractor to provide floral decoration for the overall exhibition as well as floral materials for exhibitors. Exhibitors place decorations in their booths/stands to enhance the booth/stands theme. A form for exhibitors to order this service for their booths/stands is typically included in the exhibitor service manual.

A delivery schedule of the orders and placement of the plants and flowers ordered should be reviewed. A person should be designated to supervise the arrangements for entranceways, staging, registration areas, and special events such as banquets or entertainment events.

DESTINATION MARKETING ORGANIZATION (DMO)

Formerly referred to as Convention and Visitors Bureaus (CVBs), **destination marketing organizations**, or **DMOs**, are non-profit and local government entities that promote the economic development of the community through travel and tourism. They provide information on local resources and services, including site selection, pre-conference, and post-convention services.

A DMO account representative can be an essential member of the show management team and should be included in pre-show planning conferences, including the event's pre-con meeting prior to set-up.

DESTINATION MANAGEMENT COMPANY (DMC)

A **destination management company**, or **DMC**, is a professional services company that provides extensive local knowledge, expertise, and resources. They specialize in designing and implementing events, activities, tours, transportation, and program logistics.



REGISTRATION

The exhibition participant's first stop on-site is the registration area. The exhibition organizer or identified staff should continually monitor wait times, crowd control, attendees who need assistance, system equipment, badge inventory, and all aspects of the registration process.

The exhibition organizer may work with a DMO or DMC to hire temporary workers to direct registrants, issue badge credentials, and serve as cashiers. Daily management of this group includes training and scheduling of the staff, ensuring that each person gets meals and adequate breaks, monitoring and tracking on-site attendee flows, answering questions, and ensuring that computers stay in working order.

Communication protocols regarding attendance numbers released to the public and press should be reviewed and re-confirmed by appointed staff. A daily summary report by registration type allows the show organizer to modify some food and beverage orders and adjust room set-ups for smaller or larger audiences based on actual attendance data.

The registration vendor also generally provides a system for exhibitor lead retrieval, including the distribution of the equipment prior to the exhibition opening, collection at the exhibition's conclusion, and assisting exhibitors with data management. Third-party vendors also supply lead retrieval systems.

HOUSING

Many exhibitions have a housing representative (or DMO, if serving also as housing provider) on-site to assist exhibitors and attendees with any issues or help those needing changes to their reservations.

KEY HOST CITY CONTACTS

A **host committee** is a group of people providing specific expertise of the locality and facilities of a given area to the exhibition organizer. They help with planning the exhibition and the event program. This committee is typically formed a year in advance of the exhibition and includes representatives of the host community's hospitality industry, from hotels, restaurants, attractions, and transportation to DMO staff.

If working with the DMO, the DMO's sales representative will most likely contact the exhibition organizer upon arrival. The public relations person from the local DMO can provide local media lists and assist with press releases and local media coverage.

For high-profile exhibitions, the mayor or other city officials may be scheduled to appear at an opening session or ribbon cutting to provide a welcome to the city. Staff from the city are included in the planning process and should provide an on-site contact person.

Representatives from the host city for the following year's exhibition are often on-site to observe how show management and the current destination interact. It is common for this group to sponsor a food and beverage event to promote their destination and generate excitement about their future event.



ON-SITE COMMUNICATIONS

DAILY PRODUCTION AND STAFF MEETINGS

The exhibition organizer should schedule daily meetings, or even multiple meetings throughout the day, with the OSC, the facility, and other key vendors. These meetings may be formal scheduled meetings or impromptu, touch-base meetings.

Daily meetings, also called “all-staff” meetings, should be scheduled with the organizing staff at the beginning or end of each day to review major items, schedule, or plan changes, and address any issues or situations requiring special attention. All staff should be encouraged to keep a real-time list or journal of issues and possible improvements to share at the next daily meeting.

EMERGENCY PREPAREDNESS REVIEW

A thorough threat assessment and risk analysis provide the basis of an **emergency action plan** specific to the event. This document outlines procedures for reacting and responding to on-site emergencies such as medical emergencies; fire, bomb, and terroristic threats; or natural disasters. It must align with the facility’s emergency response protocols and be distributed to each member of the core team.

The emergency action plan or crisis management plan must be event specific and must include a review of crisis planning documents from venue and municipality, if possible.

Emergency preparedness can involve venue officials, first responders, security and law enforcement, state and/or federal officials.


EMERGENCY RESPONSE TEAM

Members of the emergency response team may include:

- Senior management
- Official service contractor
- Event management
- All on-site staff and office-based staff
- Event host/sponsor representative
- Media relations
- IT and/or technical support
- Human resources
- Finance
- Legal counsel
- Security consultants and/or contractors
- Facility representative

ELECTRONIC COMMUNICATIONS

The type of communication network and equipment assigned to the positions or people who need instant communication is often dictated by the size of the exhibition. For example, two-way radios or mobile phones are used for key individuals.



In-app communication or in-app messaging may also be used. This is the act of messaging, gathering feedback, or communicating with users through a software application, either on a mobile phone or tablet device. Examples include Slack, Group Text, WhatsApp, etc. If in-app communication is used, the application must be downloaded and tested.

The communications plan should be developed prior to arrival. Once on-site, the equipment should be distributed and tested, and instructions and protocols for use reviewed. If two-way radios are used, one channel should be dedicated to staff communication, another channel to communication with the facility representative and OSC, and a third for brief one-to-one consultations.

RADIO CODES

Radio codes shorten and simplify communications among on-site staff, reducing **radio traffic**, and reserving primary channels for only essential communication. While the code words vary from country to country and language to language, they are used for the same purpose. Basic radio codes include:

- 10-4 which means "OK"
- 10-17 which means "on my way"
- 10-20 which means "what is your location?"

RADIO ETIQUETTE

Basic rules for two-way radio conversations:


ON-SITE COMMUNICATIONS

- Move to an alternate channel for lengthy conversations
- Return to the general channel when completed with business on another channel
- Meet face-to-face for a lengthy or private conversations
- Announce unavailability; (e.g., off-radio for X amount of time)
- Avoid negative comments – radio communication is not private
- Avoid panic words; (e.g., fire or bomb)
- Push the button and wait a full second before talking
- Avoid interrupting others
- Charge your radio at the end of the work shift
- The caller should identify themselves; (e.g., "Jeremy to Karen, come in")

IN-APP COMMUNICATION ETIQUETTE

Similar to the protocols used in two-way radios, you should also be respectful when using in-app communication. In-app communication etiquette includes:

- Set notifications so that you can respond quickly
- Review the accessibility guidelines
- Limit or do not use emojis

- 
- Use reactions appropriately
 - Tag group members when you need a response
 - Messages should be short
 - Use private chat for private conversations



EXHIBITION CYCLE PHASES

The three segments in an exhibition cycle are move-in, exhibition days, and move-out.

MOVE-IN (SET-UP OR INSTALL)

The first phase is move-in. Move-in is when staff and vendors work to fulfill orders and set up exhibition areas, including registration, offices, meeting rooms, signage, decorative elements, and the exhibit floor. To avoid chaos, each step in this complex process must be executed in its proper sequence. For example, electrical and computer cabling must be laid in place before carpeting is installed. Not doing so would result in needless inefficiencies and significantly higher costs. This step, however, must come only after the OSC has marked the show floor indicating the locations of booths and aisles.

MOVE-IN EXHIBITOR POLICIES

It is essential for an exhibition to open on time and for all of the exhibitors to be on-site and ready to go when the opening hour arrives. One way to keep track of whether exhibitors are on-site and that their exhibits are ready, is to compile a master status chart that outlines the progress of each exhibit installation. This chart can be maintained by a floor manager or by the OSC, and it should be updated daily. A running list of late or no-show exhibitors should be kept. If the exhibition organizer knows that an exhibitor is late and has a large installation, they should call the company to find out why the exhibitor is late. Late-arriving exhibitors should be coordinated with the OSC.

It should be decided ahead of time how no-shows will be managed. If the no-show involves a lost display, consider leaving the space and an appropriate sign to indicate the problem or set the booth with lounge seating so the empty space is not obvious. Other options include providing the exhibit staff with alternate space and display furnishings if and when they arrive. In the case of an exhibitor who does not show at all, decide what action will be taken if the exhibitor wants space in future years.

EXHIBITION/SHOW DAYS


The second phase is the exhibition itself, or actual show days. Prior to opening the doors of the exhibition, the OSC and exhibition organizer should conduct a final walkthrough to ensure that the exhibition is set properly, crates are not left in the aisles, all masking drape or hard walls are in place, and empty booths/stands have been put to good use.

Immediately before the exhibition opens, there may also be a check-in with the facility representative to test that the paging microphones are functional, exhibition hours are confirmed for lighting and air conditioning purposes, and all food and beverage stations are placed correctly and ready for service.

Many exhibitions stage a formal ribbon cutting in the moments prior to the initial opening of the exhibit hall. This usually includes VIPs from the host organization, such as an association president, local dignitaries, or celebrities. Some of these opening ceremonies may be elaborate, necessitating sound systems, stages, lighting, and additional on-site staff members.

SHOW DAY EXHIBITOR CUSTOMER RELATIONS

There are some specific policies that the exhibition organizer should review in order to handle issues that may occur during the exhibition.



Often an exhibition does not meet the expectations of an exhibiting company, and a refund or other compensation is demanded. Sometimes there will be a defiant exhibitor who refuses to comply with published rules and guidelines. The exhibition organizer should know in advance how to handle situations involving unhappy exhibitors, including deciding if one blanket rule covers all situations.

The exhibition organizer should know the policy for **outboarding**. Outboarding is when exhibitors and non-exhibitors occupy space outside the confines of the leased space in the host facility such as in adjacent public streets, parking lots, or hotels - or even overhead air space (for example blimps or skywriting).

Also, the exhibition organizer should know the policy for dealing with **suitcasing**. Suitcasing is the practice of non-exhibiting companies attempting to solicit sales from attendees on the exhibit floor.

MOVE-OUT (DISMANTLE OR TEARDOWN)

Move-out should be as well planned as move-in. Creating an orderly process is mandatory to ensure the exhibition is out of the building by the contracted time.

MOVE-OUT BULLETIN

A reminder bulletin should be distributed to exhibitors on the second-to-last day of the show to address any issues requiring more than one day to resolve. A final reminder bulletin, called a move-out bulletin, should be distributed on the show's last day. Show management, or sometimes the OSC, will be responsible for creating and distributing the move-out bulletin.


The move-out bulletin should contain, but not be limited to, the following information:

- Highlight locations of where to go with questions.
- Time the show closes and time tear down starts.
- Statement that exhibitors are not allowed to begin packing up their booths until the announcement is made that the show has closed including what penalties might be assessed if this occurs.
- Time crates will be returned to exhibitors.
- Where and when bill of lading or material handling agreements (MHAs) are to be turned in.
- Time all exhibits must be removed.
- Where post show donations go such as food, compost, and furniture.
- How to rebook for the following year.

When the show has closed, the event must be dismantled in the reverse sequential order of set-up. This means that exhibitors will pack their marketing materials, collateral, and samples before disassembling the exhibit booth. Depending on the country, the OSC or freight forwarder manages the return of crates to exhibitors, and freight movement to the loading area as well as vehicle traffic.

SECURITY AND SAFETY

During move-out, increased security surveillance and more rigid security measures are necessary. Actively encourage exhibitors to stay with their booths/stands while they are being prepared for shipping and then personally hand the finalized bill of lading to the OSC.



Increase security at all freight doors, exits to shipping dock, and all other exits from the exhibit hall. The badge identification policy needs to be strictly enforced.

Safety is also a major concern during the move-out process as it is during set-up. Accident frequency often increases after exhibitors have left, and only labor crews remain to remove crates and exhibits. First-aid services should be maintained on-site until the move-out is complete.

PUBLIC EVENTS

Public events can present unique move-out challenges because there is often less equipment to move out, and exhibitors tend to leave simultaneously, often in private vehicles. Because of this, a traffic control system should be implemented to prevent the blocking of aisles, freight doors, and other exit points. Extra security personnel may need to be scheduled to manage human and vehicular traffic at the exit doors and in parking lots.

FIRST AID

First aid services should not be terminated before move-out is complete. Many accidents occur after the exhibitors have cleared the building, and only labor crews remain, possibly with less supervision. At least one main first aid room should remain open and staffed until the last laborer has left the exhibit hall.

FACILITY INSPECTION

Just as there was an initial site inspection prior to move-in to ensure there was no previous damage, there should be a final walk through of the facility to ensure no damage occurred. The previously marked floor plan (from the initial inspection) can be used to help mark additional damaged areas and determine liability.



POST-SHOW

A show organizer's final job is to review the event and their performance as a manager.

EVALUATION

The **Post-Event Report (PER)**, is the industry's accepted format for collecting, storing, and sharing accurate and thorough post-event report data on events of all types. A collection of PERs over time provides the complete history of an event. The Events Industry Council PER Template can be found at https://insights.eventscouncil.org/Portals/0/APEX_Post_Event_Report.pdf.

A face-to-face post-event meeting between the primary event organizer (the main planning contact person) and each venue and facility should be scheduled immediately following the end of the event. Often called a **post-show analysis**, its purpose is to review all aspects of the planning and production of the exhibition.

From a planning perspective, the following questions should be addressed:

- What goals and objectives did we accomplish?
 - Why were we able to meet these goals and objectives?
 - Will the same circumstances prevail for the next event?
- What goals and objectives did we fail to meet?
 - Why did we fail to meet these goals and objectives?
- What can we do differently to improve our overall objectives?

The next step of conducting an evaluation is to obtain feedback from the key participants, exhibitors, and attendees. For exhibitors, the most common method is distribution of a post-event survey, to be completed online, by telemarketing or the sales staff.

Feedback should also be gathered from all contractors involved in the production of the exhibition. Contractors who had to implement planned tasks are often the best source of information for improving processes for subsequent events. If on-site meetings cannot be arranged before departure, interviews with the OSC and other official contractors, facility representatives, and hotel and catering personnel should be carried out immediately after the exhibition. These post-event meetings are a time to review processes to determine which aspects worked well and which require improvement.


An in-house debriefing with the core staff should be conducted as the final step in the evaluation process. This is called a **post-con** (post-convention meeting).

POST-CONVENTION MEETING

As previously mentioned, a post-con is a meeting at the primary facility where an event occurred just after it ends. It can be held with just the core exhibition team, the facility's exhibition coordinator or convention services manager, and the OSC. This meeting often takes the format of a celebration of the efforts put forth by the team. The goal is to review successes and discuss opportunities for improvement at future exhibitions in a give-and-take forum.

INTEGRATION INTO FUTURE PLANNING

Once the evaluation process has been completed, planning, and organizing for the next event begins.



The results of the evaluations must be reviewed and analyzed against the exhibition's goals and objectives. To use the information effectively for future shows, the following questions should be considered:

- What changes need to be made?
- What strategies and tactics need to be refined or re-defined to make things run more efficiently and effectively next time?
- Does the approach to current target markets match the results?
- What new ideas need to be incorporated?

When this process is complete, planning begins for the next event.



SUMMARY

It may take years to plan and organize an exhibition that lasts for only a few days. The success of an exhibition is directly proportional to the exhibition organizer's ability to direct and control the people and events happening around them while on-site during the exhibition.

Event operations (or on-site production) is a detail-oriented process. It requires constantly checking and re-checking planning decisions made months, even years prior. Success depends on implementing a process for checking, re-checking, and monitoring those planning decisions.

The results of these efforts are reflected in the exhibition's post-event evaluation, which forms the basis of planning decisions for the next event.



KEY TERMS

The following key terms are identified in this module by bold face type and accompanied by a definition. Those noted with an asterisk (*) are from the Events Industry Glossary developed by the Events Industry Council (<https://insights.eventscouncil.org/Industry-glossary>).

Account executive - A key OSC contact who has been assigned to an event and who very likely has been working with the show management team for months in advance. The account executive typically possesses as much or more information about the event as show management and can be relied upon to help meet many unanticipated challenges that almost always arise during the run of a show.

Business plan – Describes the business, its internal organization of resources, its product or service, customers, and potential market niche and share. Is used to establish or reorganize a business and to solicit funding.

Closing phase - Includes the exhibition's actual completion, recognition of approval by the exhibition organizer or owner, and an analysis of the success in achieving objectives by the team. One of the five project management phases that constitute the foundation for most projects, including managing exhibitions.

Customs broker* - An individual or company that is licensed by the government to enter and clear goods through customs.

Destination Management Company (DMC) - A professional services company possessing extensive local knowledge, expertise and resources, specializing in the design and implementation of events, activities, tours, transportation and program logistics.

Destination Marketing Organization (DMO)* - An organization defined and recognized by its status as an incorporated, non-profit agency or local government entity which promotes economic development of the community through travel and tourism. DMOs assist planners by providing information on local resources and services, site selection, and other pre-conference and post-convention services.


Drayage* - Services performed by General Service Contractor that includes delivery of exhibit materials from the dock to assigned space, removing empty crates, returning crates at the end of the event for re-crating, and delivering materials back to the dock for carrier loading. It is a two-way charge, incoming and outgoing. MATERIAL HANDLING is the preferred term.

Emergency action plan* - Procedures about how to react and respond to an emergency situation, such as medical emergencies, fire and bomb threats.

Emergency Medical Technician (EMT) - A person who is trained to provide emergency medical services to patients who are being taken to a hospital.

Exclusive contractor (provider)* - Contractor appointed by event or building management as the sole agent to provide specific services or products.

Executing phase - The process of completing the work defined in the project plan, which satisfies the project specifications.



Exhibitor appointed contractor (EAC)* - Any company other than the designated "official" contractor providing a service to an exhibitor. Can refer to an Install & Dismantle Company (I&D House), photographer, florist or any other type of contractor.

Floor manager - A person who is assigned a variety of tasks such as patrolling the show floor (some may be assigned specific aisles) to help exhibitors resolve any problems, to ensure that all exhibitors are conforming to the rules and regulations of the show, and to serve as a communications liaison among the various members of the show management team and exhibitors.

Freight forwarder* - A third-party logistics provider that handles export shipments for customers using common carriers.

Host committee - A group of people bringing specific expertise of the locality and facilities of a given area to the Organizing Committee in planning the event program.

Initiating phase - One of the five traditional elements that form the framework of most projects and helps to provide the template for developing a project management plan. During the initiating phase, the exhibition is formally established using key components.

Marketing plan - A written document that details the necessary actions to achieve one or more marketing objectives.

Marshaling yard* - A holding area where trucks or buses check in and wait for instructions before delivering or picking up freight or passengers.

Material handling* - Services performed by General Service Contractor that includes delivery of exhibit materials from the dock to assigned space, removing empty crates, returning crates at the end of the event for re-crating and delivering materials back to the dock for carrier loading. It is a two-way charge, incoming and outgoing. Sometimes referred to as DRAYAGE. MATERIAL HANDLING is the preferred term.

Monitoring and controlling phase - One of the five project management phases that constitute the foundation for most projects, including managing exhibitions. It is in place during both the planning and executing phases of the project plan. Monitoring the completion of tasks helps to ensure that the project remains on schedule and within the allocated budget. Controlling the progress of tasks also shapes the perceptions of the audience, stakeholders and leadership.


Move-in* - Dates set for installation of an exhibition, a meeting or other event.

Move-out* - Dates set for dismantling. Also called Tear Down.

Official Service Contractor (OSC) - An organization that provides event management and exhibitors with a wide range of services, sometimes including, but not limited to, distributing the exhibitor manual, installation and dismantle, creating and hanging signage and banners, laying carpet, material handling, and providing booth/stand furniture.

Outboarding* - The practice of conducting an event related to an existing meeting but not approved by the event's host organization.

Outsource* - To subcontract a task or responsibility to a supplier to handle some aspect of an event, instead of using in-house staff.



Planning phase - One of the five traditional elements that form the framework of most projects and helps to provide the template for developing a project management plan. The planning phase follows the formal affirmative decision for the management of an exhibition.

Post-con meeting* - Meeting at the primary facility at which an event occurred just after it has ended. Attendees generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as appropriate, and contractors.

Post-Event Report (PER)* - The industry preferred term for a report of the details and activities of an event. A collection of post event reports over time will provide a comprehensive history for an event.

Post-show analysis - The evaluation process that involves an in-depth look at all aspects of the planning and production of the exhibition; the primary purpose is to review the success of the management functions of planning, organizing, directing and controlling.

Pre-con meeting* - A meeting at the primary facility at which an event will take place just prior to the event beginning. Attendees generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as appropriate, and contractors.

Privately Owned Vehicle (POV) - A privately owned vehicle, such as a passenger car, van, or small company vehicle, as distinguished from trucks, tractor-trailers and other over-the-road vehicles.

Project - A planned piece of work that has a specific purpose (such as to find information or to make something new) and that usually requires a lot of time.

Project management plan - Used to guide a specific project from concept to delivery; it focuses on the project team capabilities, resources and deliverables.

Project manager (PM) - A relationship manager, managing relationships between project team members, between those members and functional units within the enterprise, between the team and senior management, and between the team and project stakeholders, whether internal or external to the exhibition host organization.

Radio traffic - Amount of communication taking place on two-way radios.

Shot list - A schedule of required photos given to a photographer. Should be created in sequential order and must contain a description of the required shot, location and time.


Show management office - A remote office work area used by show management that is stocked with basic supplies, printing capabilities, exhibition files and other resources necessary to conduct business.

Strategic plan - Systematic analysis of an existing organization, focused on a vision or other significant concept and used to direct management decisions for that organization.

Suitcasing* - When a company tries to sell its product or service on the show floor without the permission or consent of the event's management.

Team - A group of individuals, all working together for a common purpose.

Third-party management company - An outside company that exhibition management and other



production elements may be outsourced to.