CSCMP ROUNDTABLE

Programs Guidebook

(Updated June 2014)

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Council of Supply Chain Management Professionals

Educating and Connecting the World's Supply Chain Professionals.

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SECTION 1. GUIDEBOOK OVERVIEW

This *Programs Planning Guidebook* is intended to help CSCMP Roundtable Officers plan, develop, and execute a successful roundtable program year. The guidebook was created by the CSCMP Advisory Committee Programs Process Team and updated by the Roundtable Service Center.

When planning the roundtable program year, it is always helpful to keep CSCMP's mission in mind…

> *"To lead the supply chain profession by connecting, developing, and educating the world's logistics and supply chain management professionals throughout their careers"*

…and to understand the original purpose of CSCMP's Roundtables:

To deliver the value of CSCMP's mission statement to CSCMP members in their local geographies by planning events for CSCMP members to:
- Connect with logistics and supply chain professionals locally
- Participate in and promote career development opportunities
- Attend educational events and tours that expand logistics and supply chain knowledge of the local market

The public is invited to attend roundtable events for the purpose of growing CSCMP membership.

Using this Guidebook

Throughout this guidebook, you will see specific terminology used to refer to particular aspects of managing roundtable programs and events.

- **Event**—a specific gathering created for CSCMP members but open to the public. An event may be a breakfast/lunch/dinner event with a subject matter expert (SME) guest speaker or panel discussion, a guided tour, a networking event, seminar/symposium, golf tournament, etc.
- **Program**—a comprehensive plan and overview for a minimum of six educational events during the roundtable program year.

As such, the program provides the plan for the year in which the various events take place. If you are speaking about all of your events for a year, you are talking about your program. Whereas individual activities and tasks for a particular event would be considered event tasks. Program Management then is the development and management of a program plan for the roundtable program year (August-May) that includes each individual event that is planned.

For example, say the theme for the roundtable year is Benchmarking and Best Practices. With that in mind, you may come up with a program of hosting a dinner event with a speaker on benchmarking for one event, a tour of a facility recognized as best in class for another, a dinner

event with a speaker discussing how a company used benchmarking to improve its operations, and then the final event of the program, a dinner event with a panel of experts discussing the pros and cons of benchmarking.

Example of Theme, Program, and Events for a Roundtable Year:	
Theme	• Strategies: Benchmarking and Best Practices
Program	• session on best practices • session on benchmarking • tour of a best-in-class facility detailing best practices • session with results of using benchmarking to improve operations • session with experts discussing the pros and cons of benchmarking and best practices
Events	• dinner event location X with speaker from Hewlett-Packard on best practices • dinner event @ location X with benchmarking expert (academic) speaking on model-based versus traditional benchmarking following dinner • tour of a UPS best-in-class sortation facility with guide/speaker detailing best practices • dinner event @ location X with practitioner explaining how their organization used benchmarking to improve their operations • banquet dinner event @ Marriott with panel of experts in debate format covering pros and cons of benchmarking and best practices

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SECTION 2. ROUNDTABLE VICE PRESIDENT OF PROGRAMS ROLE AND RESPONSIBILITIES

The Roundtable Vice President of Programs typically has several goals associated with program quality, speaker management, membership, and communications.

Vice President of Programs Goals

- establish a strong program of events for the roundtable program year
- develop, manage, and execute roundtable events that educate and further the knowledge of local/regional supply chain professionals
- increase membership and attendance with high quality speakers, high impact topics, and well-run events

Achieving these goals involves a variety of responsibilities within the role of the Vice President of Programs.

The Role of the Roundtable Vice President of Programs

Possibly the most important role of the Vice President of Programs is to facilitate the organization of roundtable programs that are relevant to local industry issues, and cover the Cornerstones of Supply Chain Management's eight learning block topics and local audience interests. An important aspect of managing programs is ensuring effective communications between the roundtable and all speakers. As a leader on the roundtable board, the Vice President of Programs is expected to attend all roundtable events and support other roundtable board functions, including membership growth and marketing.

Roundtable Vice President of Programs Responsibilities

1. **Assist Roundtable President**
   For many roundtables, the Vice President of Programs is considered second in command to the Roundtable President, and is often a planned successor to the Roundtable President. With this future responsibility in mind, the Vice President of Programs is expected, in the Roundtable President's absence, to preside over and manage board events, as well as to support the Roundtable President as needed. Generally, this involves standing in for the Roundtable President during necessary absences. The specific tasks of a Vice President of Programs in assisting the Roundtable President vary by roundtable and will basically involve whatever your roundtable deems necessary and appropriate. There are no hard and fast rules regarding the Vice President of Programs' responsibilities in assisting the Roundtable President.

2. **Promote Membership and Recruit Volunteers**
   Everyone on the roundtable board is expected to promote membership in CSCMP and participation in the local roundtable. The Vice President of Programs is in a particularly useful role for recruiting because of his or her opportunity to recruit new volunteers as event coordinators who have a focused responsibility for a single event, and who can also grow into other positions on the roundtable board. If the Vice President of Programs is introducing speakers at roundtable events, this is another opportunity to promote membership and recruit new volunteers for the roundtable board.

   The Vice President of Programs should always be on the lookout for event attendees who express interest in understanding how the roundtable board functions or what the board does. These individuals are your future roundtable leaders, willing to volunteer if asked, but unsure of how to.

3. **Establish Program for Roundtable Program Year**
   The key responsibility of the Vice President of Programs is to establish an overall program for the entire roundtable program year that typically begins in August and wraps up in May. This does not, however, mean that the Vice President of Programs is solely responsible for programs. Rather, it means that the Vice President of Programs is expected to spearhead the effort and lead the roundtable to the successful development and execution of a quality roundtable program year and successful roundtable events.

4. **Develop Program and Event Budgets**
   In addition to establishing a quality program for the roundtable year, the Vice President of Programs also needs to ensure that budgetary constraints are observed.

   The two most fundamental responsibilities regarding budgets are to:
   - make sure that there is enough seed money to pay the deposit on an upcoming event
   - make sure that events do not incur losses, or notify the roundtable board of any expected losses in revenue

   A variety of event budget forms are available in the Roundtable Officers Resources link on the CSCMP web site at cscmp.org.

5. **Manage Programs Committee or Programs Team**
   Many roundtables have a Programs Committee or Programs Team chaired by the Vice President of Programs. This team's responsibility is to recommend ideas and speakers tied to the Cornerstones of Supply Management's Eight Learning Blocks:
   - Supply Chain Management
   - Demand Planning
   - Procurement and Supply Management
   - Manufacturing and Service Operations
   - Transportation Management
   - Inventory Management
   - Warehouse Management
   - Order Fulfillment and Customer Service

A single individual may be responsible for each event, or perhaps programs team members have specific roles in managing each event, such as having one person who manages all communications with speakers and another who is always responsible for on-site registration. If a roundtable is small and does not have a "team" of people working in programs, then the Vice President of Programs will likely be managing events with some assistance from other roundtable officers. The Vice President of Programs, is, in any case, ultimately responsible for the successful execution of roundtable events.

6. **Establish Roundtable Program of Events**
   The first responsibility of the Vice President of Programs is to select and get board approval for event topics and formats. This may also involve establishing event dates, though many roundtables have found that selecting and adhering to a set day of the week and week of the month (such as always having roundtable events on the third Thursday of each month) is beneficial.

7. **Recruit and Manage Event Coordinators**
   The Vice President of Programs may choose to recruit event coordinators who are each responsible for managing a single event. If your roundtable is of sufficient size to have a separate individual manage each event, we strongly encourage you to do so. The benefits are two-fold: this is a fantastic way to recruit new roundtable board participants and find future leaders for your roundtable, and it reduces the task load of the Vice President of Programs so that he or she can oversee each event without getting burned out executing every task for every event. Again, though, if the roundtable is small, it is likely that the Vice President of Programs will be doing most of the event management directly, with some support from the other roundtable board officers.

8. **Arrange Speakers**
   Once the event topics are agreed upon by the roundtable board, the Vice President of Programs (or event coordinator, if you have one) needs to contact, obtain commitments, and make arrangements for speakers. To assist roundtables in this process, the Advisory Committee Programs Process Team has developed several speaker management tools, which are described in the Speaker Management section of this guidebook. In the event that a local speaker is not available for a certain Cornerstone topic, the roundtable will leverage the Roundtable Service Center to assist in securing a "traveling" speaker for the "speaker bank" on said topic.

9. **Submit Schedule of Activities to CSCMP**
   Once the roundtable program year of events have been planned and speakers arranged, the Vice President of Programs is responsible for submitting the roundtable's Schedule of Activities form to the Roundtable Service Center. The Schedule of Activities form is due no later than August 15 and is available online in the Roundtable Officers Resources area of CSCMP's web site.

Roundtable Vice President of Programs Tasks

The tasks that a Vice President of Programs needs to cover can be grouped into time buckets around each roundtable event, occurring either before, during, or after the event.

Getting Started

As discussed earlier in this guidebook, the Vice President of Programs needs to lay out the program schedule for the entire roundtable year. This should include preparing a back-up speaker/topic/event to replace a speaker who must cancel at the last minute.

Before the Event

Once the roundtable's Cornerstone calendar of events is established, the Vice President of Programs should ensure that speakers are identified, contacted, and committed. Several details of the event should be communicated in writing to the speaker, including:

- expected content
- expected audience
- expected attendance
- event schedule (registration/networking time, breakfast/lunch/dinner start time, presentation start time, presentation end time, planned Q&A time, and so on)

The speaker should also receive an advance copy of the planned event notice and be given an opportunity to suggest edits to the title, topic description, or speaker details.

This should theoretically happen during the summer months, before the roundtable's program calendar starts, but at a minimum, all pre-event tasks should be completed at least two months prior to each individual event.

In some roundtables, the Vice President of Programs is also responsible for drafting and/or sending event announcements to the roundtable's e-mail list. In other roundtables, the Vice President of Programs is responsible for writing the event announcement but the Secretary, Vice President of Membership, or Technology/Marketing Chair is responsible for announcement distribution. Either way, the Vice President of Programs is responsible for ensuring that the announcement is written, approved, and sent, regardless of who actually executes the tasks.

At the Event

For the event, the Vice President of Programs should make sure that speakers have transportation and directions to and from the event, especially if he or she is traveling from out of town. Picking the speaker up at the airport or giving him a ride from his office is a great way to get time with him just before his presentation to prepare him for any last-minute updates about the attendance, event facility, or how the event will be run.

At the event, the Vice President of Programs should make sure the event begins on time. Announcements and housekeeping items are kept to a minimum, so that the focus of the introduction is on the speaker.

It is often helpful to the speaker if the Vice President of Programs helps formulate questions or facilitates discussion at the end of the formal presentation. Often, if asked, the speaker will provide seed questions that the Vice President of Programs can place with various roundtable board members in the audience to initiate discussion after his or her presentation.

The event should end at the designated time as communicated on the event announcement. Make sure that event staff is aware of the event schedule (speaker start and end time especially) and the planned ending time of the event, so that staff is not clearing plates or pouring coffee and making noise during the speaker's presentation.

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At the end of the presentation, stand and formally thank the speaker. It is a nice gesture to present him or her with a small speaker gift such as a CSCMP logo pen or notepad. Ask attendees to complete an event evaluation (sample forms available under Programs on the Roundtable Officer Resources link at **cscmp.org**).

Do not leave the event until the speaker is prepared to leave. Make sure that he or she has transportation from the event.

After the Event
Within 24 hours of the event, a "Thank You for Attending" e-mail should be send to attendees, announcing the next event and promoting membership. It is also a nice gesture to have the Roundtable President send the speaker a handwritten thank-you note.

The Vice President of Programs should also review the event evaluations completed by the audience and include a summary evaluation in the Activity Report.

SECTION 3. PLANNING THE ROUNDTABLE PROGRAM

The process of planning the activities of a roundtable should involve the entire roundtable board. The Roundtable President has overall responsibility, however, all officers and committee members are responsible for ensuring that each event, particularly the portion under their individual areas of influence, is well planned and executed. Planning for the roundtable program year should begin well ahead of any events.

Getting Started

Many roundtables hold board planning events immediately following the CSCMP Roundtable Leadership Forum in June. This allows them time to plan the next program year and submitted a timely Schedule of Activities. It is recommended that events are scheduled and confirmed approximately six months prior to an actual event. This allows sufficient lead time to ensure quality programs and venues.

If the previous roundtable board has already scheduled and confirmed the events from June through December, the planning process needs to be for the programs starting in January through the following December. This overlap in the planning process provides continuity and time to produce quality programs and venues.

Selecting a topic, committing a speaker, and contracting for an event facility on short notice is risky. If your roundtable is faced with planning the first event on short notice, you may want to schedule a facility tour as it requires less time to organize.

Beginning in 2015, roundtables will elect the new roundtable board and committee members in January/February for two-year terms. Ideally, the newly elected board will begin the planning process for January-December of the following year because August-December has already been planned by the outgoing board.

Planning Process

The first step in planning the upcoming year's program is not selecting the topic or speaker. The first step is to ensure that your new roundtable board understands its roles and responsibilities, and reviews the previous year's events.

To begin the planning process:
- Verify that a transition event has been conducted between the previous and current year's officers and committee members. Make sure that all new members are aware of the expectations of their roles in the roundtable. It is critical that each member deliver on his or her commitments to the roundtable, otherwise it becomes more difficult for the other members.

- Evaluate audience feedback from the roundtable's event critiques or results of an annual survey.
- Review the profile of CSCMP's members in your geographic area (contact the Roundtable Service Center for information on how to access this data).
- Review the previous year's events and performance, including the roundtable's financial status.

After the officers and committee members have evaluated the background material, the group should discuss and agree on a strategy for the roundtable in the upcoming year:
- What are its goals?
- What is the theme? Link to the Cornerstones of Supply Chain Management's Eight learning blocks.
- What combination of resources and events are needed to accomplish the goals?
- What do the events look like? Should the roundtable conduct a tour, panel, presentation, and/or seminar?
- What are the financial constraints?
- What topics should be addressed, and who will be invited to speak?

Program Planning Structure

The entire roundtable board should participate in sequencing the Cornerstone events, brainstorming speakers, tours, and identifying gaps. Regardless of the structure the roundtable uses for implementing these ideas, the Vice President of Programs is ultimately responsible for ensuring that the program is well planned and executed.

The following are various structures used by different roundtables for program planning:
- The Vice President of Programs handles all responsibilities associated with the program and reports to the roundtable board.
- Program co-chairs share responsibilities for programs. (Note: one of the co-chairs should be identified as the main contact.) The advantage in this is in succession planning and lowering your risk of someone transferring out of town.
- The Vice President of Programs heads a programs committee that implements program activities. Each member of the committee is responsible for one or two events including the follow-up thank-you letter to the speaker, while the chairperson oversees activities and reports to the roundtable board. The advantage to this is succession planning and creating opportunities for new volunteers.
- Each member of the roundtable board is responsible for one event, including the follow-up thank-you letter to the speaker. This is useful for small roundtables.

SECTION 4. COMING UP WITH EVENT IDEAS AND TOPICS

Periodically changing the format will add variety to your activities.

Event Formats

The following are different program formats used by roundtables for their events.

Single Speaker
Having a single subject matter expert (SME) speaker deliver a formal presentation is probably the most common format for a CSCMP roundtable event.

Two Speakers
CSCMP recommends that a practitioner accompany a consultant or educator. This format offers both theory and practice in a presentation, and helps prevent a session from becoming either too "salesy" or overly academic.

Panel Discussion
A panel should have no more than three members besides the moderator. Individual presentations can address a single topic (three viewpoints on e-commerce) or multiple topics (trucking, rail, and air). It is common to allow panelists to each give a brief presentation (five to ten minutes) followed by an open discussion/Q&A with the audience. Have questions prepared in advance to get the Q&A going; the audience usually takes a question or two to warm up to the format.

Be sure to have a moderator who is capable of managing the audience and panelists. Sometimes the moderator will need to stop a line of questioning or move on to another audience member if one person goes into too much detail or off on a tangent. The moderator may also need to ensure that panelists do not go over on the time allowed for their initial remarks/presentations or that single panelists are neither too heavily nor too lightly involved in the discussion.

Lastly, though the moderator is expected to help prevent the session from becoming a sales pitch for a particular company, it is really the responsibility of all board members, especially the Vice President of Programs, to ensure that this does not happen.

Facility Tour
Facility tours are popular events for many roundtables. Tours are particularly effective when a roundtable is small and does not have sufficient funds for a breakfast/lunch/dinner event format.

For ideas on facilities to tour:
- Be creative—see CSCMP's Annual Global Conference facility tours for ideas.
- Add a question on your event or annual survey asking for suggestions.
- Ask people to volunteer their sites for a tour.

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When planning a tour event, consider the following points:

- Should the facility tour be preceded or followed by the meal (breakfast, lunch, or dinner)?
- Should the facility tour be held alone or in conjunction with a speaker (consider the total length of the event when you add a speaker or formal presentation)?
- Is there a maximum number of participants the facility will accommodate?
- Will participants meet at the tour facility, at the location of the meal, or be transported to the facility by bus?
- Is the facility noisy? Does the tour guide need amplification, and if so, is it available?
- Will there be sufficient hosts so the participants can be divided into small groups?

Tip: Consider scheduling a presentation about the facility (or the industry's operational policies and practices) at one monthly event, and tour the facility as a future event.

Seminars

Two seminar formats are common for CSCMP roundtables: a half-day seminar or a full-day seminar.

A half-day seminar held in the morning can begin with a breakfast followed by three to four hours of presentations (this could include a keynote speaker and one or two other presentations, possibly ending with a panel discussion). A half-day seminar held in the afternoon can begin with lunch followed by presentations. The day can conclude with a short networking session. If lunch is not a good starting point, go immediately into a keynote or presentations and end with day with dinner.

A full-day seminar can consist of multiple tracks or a single track. If you are attempting a seminar for the first time, a multi-track format is not recommended.

When scheduling a seminar where all sessions occur in one room, plan breaks to offer the audience opportunities to move.

Most hotels offer event packages that include a meal, a coffee or snack break, and have options for networking receptions, which can make the facility execution much easier.

Event Format Variations

The most common speaker presentation event format is to have a brief registration/networking session (30 minutes) before dinner, and speaker presentation after dinner. You can add some variety to a roundtable event by scheduling the networking hour followed by the presentation and then having dinner. The meal can conclude the event. This format works well with a presentation that will generate discussion among the audience, but can also backfire if many people choose to leave early instead of stay for dinner.

Topics – Cornerstone Focused

For many roundtables, the most difficult part of the planning process is the selection of topics and finding speakers.

Getting Ideas from Event Attendees

Selecting topics is easier if a roundtable is continuously seeking ideas from its audience:

- Request a business card from someone you meet who may make a good speaker (get his or her opinion on current issues and a suggestion for someone who can address this topic).
- Distribute a one-page feedback form after each event to your attendees that solicits their suggestions for topics and speakers.
- Because an event feedback form only reaches those who attend a roundtable event, a more extensive survey can be distributed to all event participants and local CSCMP members annually.
- Ask a business or personal acquaintance to share his or her ideas on topics of interest. Remember that each individual has a different circle of friends and associates.

Getting Ideas from Local Senior Executives

Review the member list for your area and identify senior managers. Then set up calls with these individuals to solicit feedback on questions such as the following:

- What topic/program type would be interesting to him and/or his company?
- Does the manager know of any good topic/presenters/programs that the roundtable should seek to offer?
- Does he have any employees that would benefit from becoming an officer or committee member for the roundtable?
- Would this manager have a good story to present? Local companies can be the best draw as everybody is interested in them.

Getting Ideas from CSCMP

CSCMP's annual conference is a great source of topic ideas. Educational session and speaker information is available at cscmp.org. Following each conference, CSCMP makes the list of concurrent sessions with attendance figures available as well.

Although knowing that someone is a conference speaker and knowing the number of people who attend a particular session does not guarantee a quality presentation, this information is another resource for ideas and potential speakers.

CSCMP's web site posts listings for all roundtable events. If another roundtable's topic or speaker is of interest to yours, contact that roundtable's Vice President of Programs for suggestions and/or speaker information.

One more source of ideas is the conference calls with your advisor and other roundtables. Most roundtables have had one or more exceptionally successful events that they will enjoy discussing with you and your group.

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SECTION 5. SPEAKER MANAGEMENT

Once the roundtable board has approved the topics to be covered during the upcoming program year, speakers best able to address the program topics need to be identified and invited to present.

Finding Speakers – Speaker Bank

A speaker pool is available through the Roundtable Service Center that lists:
- speakers from the annual conference
- speakers recommended by roundtables
- speakers recruited by the Programs Process Committee

The Roundtable Service Center will make numerous attempts to identify and remove the name of any speaker who receives unfavorable comments, or those who do not possess the presence, knowledge, or skills needed to speak.

Speaker Management

Your work is just beginning once a speaker is committed. To ensure that you have offered the best quality program to your members, it is recommended that you manage your speaker(s) carefully. There are several issues that must be conveyed to the speaker and details the roundtable requires to prepare for the event:

Initial Speaker Contact
- Agree on the topic and due date for a written description of the presentation for the event announcement. This should be coordinated with the board member who is responsible for marketing and updating the web site to ensure timely promotion of the event.
- Request biographical information for the event announcement and introductions.
- Request that the speaker provide an advance copy of the presentation that can be reviewed and modified should it not meet your objectives for the event or contain content contrary to CSCMP's promotional guidelines.
- Is this individual presenting alone, with a co-presenter, or on a panel?
- Commit to a day, date, time, and location.
- Is the speaker(s) expecting to be reimbursed for expenses? Which expenses and how will they be handled?
- If the speaker is from out of town, does he or she arrange his own transportation to the event location or will someone provide transportation?
- Provide the speaker with background and demographic information about CSCMP and your roundtable. This will help him target the presentation to the needs of your audience.

Speaker Confirmation
The speaker confirmation letter/e-mail should include a confirmation of the original discussion.

- Provide insight into the roundtable's audience, profile the typical audience, and the expected number of attendees for the event.
- What is the agenda for the event?
- If the speaker(s) is personally handling his or her own transportation, be sure to provide the address and telephone number of the event facility, driving and parking instructions (including expected travel time), what time he should arrive, and who he should contact upon arrival.
- Seating arrangements for the meal: is there a head table?
- Include in the letter/e-mail a form for him to reply with his audio visual needs.
- Will handouts be provided?

One Week Prior to Event
- Confirm that a copy of the event announcement has been sent to the speaker.
- Personally contact the speaker and review all arrangements and audio/visual needs.

Event Day
- If part of the agreement, confirm speaker(s) transportation is being handled.
- Arrive at the event facility early to confirm arrangements and greet speakers(s).
- Make sure audio visual equipment is set up and working.
- Review the biographical information and introduction.
- Confirm seating arrangements for the speaker(s) and special guests.
- Request three or four questions from the speaker(s) to start the Q&A should it take some time to gain momentum.
- Following the event, confirm the speaker(s) return transportation arrangements.

The Next Day
- Send or have the Roundtable President send a handwritten thank-you note to the speaker(s).
- Send a "Thank You for Attending" e-mail to all attendees announcing the next event and promoting membership.

SECTION 6. EVENT MANAGEMENT

Planning the Event

Planning the event means having available all the information you will need about the event: the "who, what, where, when, why, and how." You will need to know what time the event begins and ends. You will need a good estimate of how many people are expected to attend, and how much space you will need from the event facility.

Even though you may have a desirable location, it is recommended that every two to three years a roundtable contact several event facilities and request a bid for your event. You must provide the event facility with the estimated number of attendees and a sample meal for them to price. The event facility may give you a price break if they know you are looking at several bids. The cost may also be negotiable if you are guaranteeing them several functions during the year.

The next step is to book the event facility. Be sure to secure the space you need as soon as possible. Your contact in most instances will be the catering or sales manager. Call them and see if they have space available on the date of your event and find out if there is a room rental charge. Room rental fees are negotiable so you may want to find out if the fee is flexible (based on the number of meals served). If the event facility will not negotiate the fee, you may want to look for another location. Remember, all costs/fees are negotiable, so do not hesitate to ask.

Preparing the Event

Many roundtables have a hospitality chair on the roundtable board whose responsibilities include event facility arrangements. If your roundtable does not have a hospitality chair on the board, the Vice President of Programs is responsible for ensuring that event facility arrangements are made for each event.

As part of the event preparation, you should request:
- a menu and price list
- the gratuity % amount (added before or after tax)
- the sales taxes % amount (city, county, state)
- meal guarantee requirements
- lead time for meal guarantees (i.e., how many days before the event)
- the percentage above the guaranteed number of meals that will be prepared for walk ins

A meal guarantee is the figure you will give the event facility as a minimum number of paid meals. It is important that the roundtable keep a history of individuals registered, and the number of walk-ins and no shows. The records will reveal a pattern and allow the roundtable to guarantee a number close to the actual individuals served—you do not want to pay for meals that no one enjoys.

This should be your meal guarantee. You have adjusted for those who walk in without reservations and for the number who usually do not show. The event facility will charge you for 31 dinners even if only 15 people show up—you will be charged for 36 dinners if you have additional walk-ins. The event facility will prepare a certain percentage above your guaranteed number to cover any last-minute additions—make sure you ask your event facility contact for that percentage. (One trick/tip is that some roundtables take the reservation list and subtract the upside that the hotel normally can cover. Only raising it as on-site attendance proves the number needs to go up. If you go over, your roundtable officers can get an alternative meal that the event facility can prepare quickly.)

You will need to communicate how the room should be set up:
- What configuration should the tables be set in? (rounds, classroom, auditorium)
- How many tables? (Eight to 10 people per table is typical.)
- Do you need staging? (For a larger group, you may need a two-foot riser.)
- Does the speaker use a standing lectern? (If lights are turned down low for the presentation, make sure it has a light.)
- What are the audio-visual requirements, such as microphone, overhead projector, LCD? (Note: these can be expensive add ons; don't order them if the speaker does not need them. Some roundtables have invested in an LCD for the roundtable, others use an LCD from the company of one of the roundtable officers.)

Note: One way to make sure everything is covered is to have an arrangements' checklist. A copy of the checklist can be sent directly to your event contact.

Contracting for Event Space

An evaluation of your event location should be an annual agenda item for your roundtable board. It is recommended that the roundtable select one event location for the entire program year: consistency creates familiarity for attendees. Multiple functions at the same event facility also gives the roundtable more bargaining power.

During the annual review process, consider:
- The location—is it easy to find?
- The travel time for attendees—is it in a centrally-located area?
- Available parking—do attendees have to pay?
- Room capacity—does the event facility have several size rooms which allow for increased attendance?
- Quality of the event facility (very important)?
- Cost (room rental, food, and services)?
- Customer service—is the event facility's staff accommodating?

Whether the roundtable decides to remain at the same location or evaluate new properties, the board should compile a list of specifications to be used during the selection and negotiation process.

The specification list should include:
- All event dates and times

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- Anticipated number of attendees
- Meal and hospitality bar requirements
- Audio visual requirements
- If the roundtable uses a hotel, request room rates for overnight guests.
- Other services

The board member (normally the responsibility of the hospitality chair or treasurer) assigned to handling the selection process should compile a list of possible sites and present it to the entire board for discussion and a decision.

Conducting the Event

- Offer to arrange for transportation to and from the event for the speaker, if needed.
- Arrive early (at least one hour prior to opening).
- Locate your hotel contact or the person who is assigned to your event (usually a banquet captain—verify all your requirements have been met).
- Organize your registration table and name badges.
- Make sure attendees can find the event—check the daily events board and use signage to direct your attendees.
- Find the restrooms, and make sure you have everything you requested on your planning sheet.
- Check the room set up and audio-visual equipment.
- Walk through the event room to make sure it is set for the correct number.
- Familiarize yourself with the room: Find light switches. Check to make sure any equipment cords are taped down. Check to make sure all equipment and lights are working.
- Locate fire exits and make sure the doors are unlocked and passageways clear.

Take note of any items missing from your planning sheet and call your contact person. Thank them for the items that were correctly set and complete a final review of the event.

At the Event

- Make sure that the speaker has a badge.
- Make sure that you introduce the speaker to the officers and other attendees at the event.
- Make sure the speaker's presentation is cued up and working.
- It is a good idea to have a PowerPoint with announcements scrolling during dinner and prior to the speaker's presentation.
- Have someone at the door to greet attendees.
- Make sure board members mix with the audience.
- Greet first timers and introduce them to other attendees.
- Make sure board members are seated at different tables.
- Where is your speaker(s) sitting?
- Start the program on time.
- Do housekeeping announcements before the presentation.

- It is good practice to introduce CSCMP board members and committee chairs who may be visiting your roundtable. If you have some local members who serve on a CSCMP Advisory Committee or Process Team, it is nice to recognize them as well.
- Be prepared to properly introduce your speaker, highlighting his or her experience and accomplishments. It is best to not just read a prepared biography of the speaker(s). Focus on the speaker, not your experience or comments.
- Ask your officers to be prepared for questions for the speaker(s) to start the Q&A segment of the program if necessary.
- Assist the speaker(s) in identifying questions from the audience.
- End the program on time even if there are hands raised in the audience. You can suggest that the speaker can answer more questions.
- Remind the audience of upcoming roundtable events.
- Thank everyone for attending.
- Be sure to stay with the speaker until the event is completely over. It is a good practice to be the last person to thank the speaker as he or she is leaving.

SECTION 7. EVALUATIONS

Gaining ideas from your audience for decisions on topics and speakers is important for the long-term viability of your roundtable. A roundtable's audience should also be asked to provide suggestions on event dates, times, and locations.

Event Survey

You may want to use a short survey form at the end of each roundtable event. This survey offers your attendees an opportunity to give opinions on each specific event. Suggested questions include:
- How did the audience like the speaker(s)?
- Did the event facility provide good service?
- Are you interested in volunteering for a roundtable committee?
- Specific needs (i.e., board positions which are available)

Annual Programs Survey

For input to support the roundtable when developing topics, speakers, and potential tour sites for the upcoming roundtable year, you could use a more extensive survey distributed to the roundtable's entire database. This Annual Program Survey can request information on:
- favored topics
- potential speakers for these topics
- suggestions for tour sites

Note: Examples of the event and annual surveys are available from the Roundtable Service Center.

SECTION 8. COMMUNICATIONS

With the leadership in the roundtable changing every other year, consistent, quality communications are vital for the roundtable's continuing success and viability. There are many stories about individual roundtables not promoting their meetings adequately, or far enough in advance, which resulted in having a fraction of the attendance that had been expected.

As people get increasingly busier, there are a few elements which are necessary to a roundtable's communication strategy:
- annual schedule of events (listing every event date)
- consistent reminders of upcoming events
- clear and concise event announcements

Media Contact

Contact your local newspaper. (For an updated list of publications that frequently contain material of interest to logistics personnel, contact CSCMP's Roundtable Service Center.)

When contacting the business editor:
- Ask when a convenient time to call would be to ensure your information will be included in the business pages. (Deadlines and breaking news events will come first, so call back at the most opportune time.)
- Describe to the editor how logistics and supply chain management affects their newspaper readers. Call attention to major companies in your area and how they rely on logistics and supply chain management. (You may have to convince the editor that your message will have a news appeal to those who advertise, buy, or read his or her newspaper.)
- Give them specific event information: who, what, when, where, and how to contact the roundtable.

Provide the newspaper with background material, including:
- Up-to-date promotional materials explaining who CSCMP is and what we do
- Schedule of Events for your roundtable (Note: Multiple roundtables in one state can coordinate efforts. Provide a comprehensive schedule of events for the entire state/area.)
- Leads for stories or interviews with companies/individuals associated with your roundtable discussing the impact of logistics and supply chain management.

It may take several phone calls or e-mails before you succeed.

Additional Marketing Guidance

CSCMP's Roundtable Advisory Committee has a Marketing Process Team whose focus is to assist roundtables in developing good roundtable marketing. Reach out to the Roundtable Service Center for more information.

Communicating Your Event

E-Mail Do's

- Use a "blind copy" field for bulk addresses or use the mail merge function in Outlook to personalize event announcements.
- Include complete contact and event information (name, phone, e-mail, time, location, speaker, and topic).
- Limit the use of upper case letters; this is considered shouting electronically.
- Give concise information on the "Subject" line.

E-Mail Marketing Tools

Investigate online marketing tools, such as Constant Contact. Many tools offer free versions. Larger roundtables will have to consider paying for these services from the roundtable budget.