

# Organising a Professional Conference: An Insider's Insight

Scientific meetings are at the heart of a scientist's professional life – we love conferences. They provide an invaluable opportunity for researchers and scientific professionals to explore new ideas and network with peers. They come in many formats – conferences, tradeshow and single-day workshops, ranging from 1 – 20 people to large-scale, multiday meetings of 1,000 or more delegates. Early in our careers they tend to be events that we attend with no consideration of the organisation that goes on behind the scenes. However, stay in the industry long enough and you will eventually be expected to contribute to their delivery.

Large or small, the secret behind the delivery of successful events is a blend of planning and organisation – ensuring that everything runs smoothly and everyone is having an 'experience to remember'. Here we describe requirements around the 10 key aspects you need to master. Crack these and you will be a hard act to follow. Miss one and the whole event might come tumbling down around your ears.

## BEFORE YOU START

Never underestimate how much time it takes to plan an event.

Give serious consideration to hiring a professional and experienced event management company.

By establishing a 'theme' early on you create the opportunity to focus event planning without having to finalise details.

Aim for a good balance of 'invited' and 'contributed' talks from representatives spanning the full breadth of your field's interest.

People often attend conferences so they can network – create that opportunity.

Use headline speakers to attract attendees and make your event memorable.

## PREPARE TO SUCCEED

The bigger the meeting the more people you will need to deliver the project.

Build a delivery team, identify key roles for each team member and then delegate, delegate, delegate! Delivery timelines should be established and a schedule set out to share regular updates.

Plan your event on a date that isn't close to those of established conferences. Avoid local celebrations, ceremonies and holidays.

Be sure that the venue is welcoming and serene and that the scope and layout are fit for purpose.

Try to set a budget that can be balanced without the support of sponsors.

Use the widest variety of tools and technologies to generate interest in your event.

## KEY INSIGHTS

We attend many meetings during our careers and soon come to differentiate between those meetings that we know are well organised and executed and those that aren't. Beyond not meeting our specific expectations there are ten interrelated factors that are key in determining why some meetings are better than others. The only way to deliver each of these factors successfully is to deal with it like you would any other 'project' and develop a comprehensive plan.

Never underestimate how much time it is going to take to plan an event. And never underestimate the value of planning – 95% of the success of a meeting is secured in the planning phase. A useful rule of thumb is that if your event includes over 150 participants you should consider beginning the early stages of planning 8 months or even a year in advance, having a fully developed plan 5 – 6 months before the date of the meeting.

You are likely to have a general concept of what you hope to achieve before you start your planning journey. In the case of annual conferences, for example, experience from previous years can serve as a helpful guide. Use the list opposite to map out your expectations. As with any project, the more ambitious the scope the more actual planning will be needed and the more detail you will have to provide.

The scientific literature provides some helpful guidance on key considerations when planning an academic meeting [1].

### 10 KEY FACTORS FOR A SUCCESSFUL MEETING

- Delivery Team
- Date
- Venue
- Theme
- Speakers
- Budget
- Marketing
- Sponsorship
- On Site
- After the meeting

# TEAM (Organising Committee)

John Donne wrote 'No man is an island', expressing the concept that we do badly when isolated from others, needing to be part of a community in order to thrive. You should extend this to the process of event organisation and recruit a powerful and creative team.

Where can you find the volunteers you need? The body or institution for which you are planning the meeting can be a ready source of volunteers. The bigger the meeting the more people you will need to deliver the project, but be selective. Larger groups become more difficult to manage and less efficient (see 'The Perfect Number' below).

As you set up your organising committee, try to identify people who have experience in event planning and/or the various key tasks you need to fulfill. Understand your own specific skill sets and recruit those that will complement your strengths and weaknesses. Don't be ashamed to admit if there are administration or management aspects that you don't know how to handle. You may have excellent people skills but find it difficult to manage budgets and spreadsheets. One of the critical selection criteria for any committee/team member is whether they have sufficient time to make a worthwhile contribution. You may want to consider including at least one representative who is 'local' to your proposed venue.

Once you have your committee it is time to delegate, delegate, delegate! Identify key roles for each team member. Delivery timelines should be established and a schedule set out for regular update TCs/meetings.

## PROFESSIONAL SUPPORT

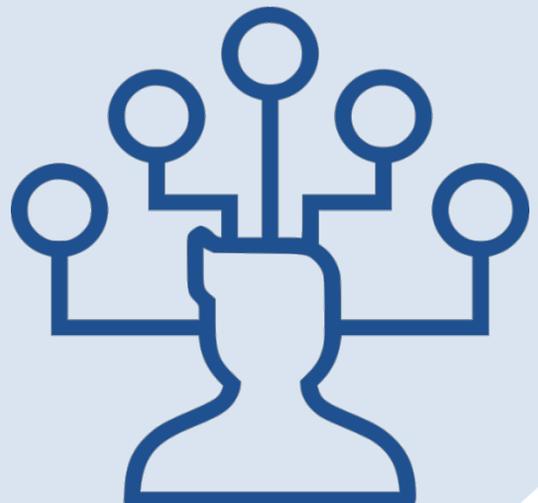
Responsibility for organising large scale events involving hundreds, if not thousands, of delegates/ attendees from all over the world can be daunting. Where there is sufficient budget give serious consideration to hiring a professional and experienced event management company. The earlier you employ your company the better. However, you will need to have consensus from your organising committee around the details of the 10 key points – particularly around the scope and budget prior to the briefing.

## THE PERFECT NUMBER

Sports teams have set numbers of players. For example, a football team has 11 players. Outside sport we use teamwork to deliver complex projects but there is no hard-and-fast rule to determine optimal team numbers.

As the number in a team grows there is an exponential increase in the number of connections that need to be managed, potential for social loafing by team members, relational loss and cohesiveness challenges. Evidence suggests that well-designed and well-led work teams can indeed give great performances. But capturing the benefits of teamwork requires, at minimum, (1) careful thought about the proper type of team for the work to be done and the setting in which it will be done, (2) knowledge and skill, including an ability to create and maintain conditions that increase the likelihood of good performance [2].

Team size will be a key success factor but how many? A recent article on 'How to Build a Great Team' in Fortune magazine suggested this should be 4.6 team members [3].



# DATE

Though there is no single 'most-important' factor when planning an event, time will always be a critical success factor. Establish the date of your event as quickly as possible. Where it is an annual meeting you want to announce the date (and venue) of your next meeting at the close of this year's meeting.

The bigger your event the more planning time you will need, if for no other reason than there are fewer available venues, many of which must be reserved many months in advance. Also, the diaries of high-profile speakers are quickly booked up more than a year ahead of time – so confirm their availability to attend as early as possible. Points to consider on setting dates include:

- Pick a date that isn't close to dates of established conferences that may be relevant to your potential audience.
- Reject holiday periods – participants in Europe tend not to attend conferences in the summer or winter. Choose a date between mid-March and late June or between early September and late November.
- Don't pick weekends – organisers, speakers and contractors view conferences as work commitments and are less eager to attend work events on weekends.
- Choose dates later in the week – having your event include Thursday and/or Friday allows attendees to travel during the week, attend the event and play the tourist at the weekend.
- Avoid local celebrations, ceremonies and holidays – as much as they can be predicted, festivals, political demonstrations and elections can interfere with delegate travel and general operations during the event.

# SPEAKERS

Headline speakers offer the potential to make your event memorable and thus attract more attendees. Once you have a reasonable idea of the date and theme of your event you should start looking for inspirational professionals and industry leaders to make your keynote address and closing presentations. If you can, get the early buy-in of a big headline speaker and/or guest and ask if you can use their name on promotional materials.

Points to consider:

- Aim for a good balance of 'invited' and 'contributed' talks with representatives from across your fields of interest. Give due consideration to 'local' talent (it's only polite since locals are likely to make up most of your audience).
- Try targeting younger researchers for the invited talks to both promote newer voices and reduce the number of talks given by senior scientists (who tend to give similar talks at multiple conferences every year).
- Have a few backup speakers available in case there is a cancellation a few days before the conference.
- Prior to the meeting, provide invited speakers with guidelines to any points you would like them to address.
- Make sure you have the mobile numbers for all your speakers to hand in case they don't arrive as expected. They might just be stuck in traffic, but a brief phone call will explain their delay and save you anxious moments!

# VENUE (Location, Location, Location!)

Serious consideration should always be given to ease of access for all delegates (road, rail and air) in addition to the quality, availability, affordability and range of venues and accommodation. Attendance will always be better if you are close to a major travel hub.

You need to be sure that the venue is welcoming and serene and that the scope and layout are fit for purpose. For example, Advisory Boards tend to favour inverted 'U' or boardroom-style layout rooms. Larger meetings of up to 100 delegates tend to suit a 'cabaret' style. For larger audiences, e.g. up to 500, you need to adopt a 'theatre' approach. Remember, the more delegates you expect the greater number of 'management' spaces you will need for registration, networking, corporate booths – don't forget to plan for 'biological' requirements (food, restrooms, en-suite facilities etc).

## PROTOCOL

Professional societies will often cycle annual events from one country or city to another to satisfy local organisations. This may determine the country or city where your event will be held, leaving you to make the decision on the best venues.

Engaging a professional, locally-based organiser will aid you significantly in identifying the best venue. If you are choosing your own location/venue remember that you want to hold it somewhere nice, but not too nice. You want to attract people to the event and have them enjoy the location, but you don't want them 'sloping off'. Generally, three types of venue are available to you:

- University, society and/or government buildings – traditionally these have been seen as the 'inexpensive' option suitable for small and/or academic events.
- Independent venues – tend to be more expensive than academic options but you can expect the venue to better fit or be more able to adapt to fit your specific needs. They also tend to be restricted on numbers and availability.
- Hotels – these venues tend to be good for corporate events but they can be pretty expensive. You may however be able to negotiate good room rates for delegates.

## REGISTRATION

Registrations are the lifeblood of your event.

- Be strict with your registration deadlines – it will save you many headaches later on.
- Clearly state your cancellation policy and any refunds for registration fees and hotel bookings.
- Provide clear details of what the fees include – attendance, delegate pack, lunches, coffee etc.
- Give careful consideration to introducing concessions as they can create a logistical nightmare and mess up your budget calculations.

DON'T MAKE  
ANY DECISION  
ON VENUE  
WITHOUT  
PERFORMING A  
SITE VISIT

Have a checklist and ensure that the site meets with your requirements

# THEME / AGENDA / PROGRAMME

It is impossible to fully describe what your programme will look like on the first day of planning. However, establishing a 'theme' up front gives you the opportunity to raise awareness of your event without having to decide on specific details up front. You can use the theme as a guide while you develop the programme agenda more thoroughly. Consider the potential delegate profile when deciding on your theme. Make sure that you have a sufficiently broad range, without being too generic.

As you narrow down on the detail remember that covering a broader range of subjects and including 'hot' topics will increase the number of people likely to attend. However, as you increase the breadth you will restrict the time you have to focus on specific topics. Find a balance.

When developing your programme:

- Begin with a keynote address by an influential name in the field. Consider starting later in the day after a registration/social event to warm up your audience and get them in the groove.
- Avoid talk fatigue! Don't pack your schedule with long days and short talks. Aim to include a few longer talks that present substantive material (without speed-talking). Adjust presentation lengths depending on subject focus and content.
- Recruit high profile and/or entertaining members of your collegiate to moderate sessions. Pure science presentations occasionally need someone to spice up the audience during handovers. Establish strict rules for timing and ensure that your moderators apply these rules judiciously and keep you on schedule.
- High quality papers should form the skeleton around which to plan. Vary delivery modalities – consider including workshops, spin-out sessions, film screenings, debate sessions and open floor exhibitions.
- Allow plenty of time for breaks. Interacting with fellow attendees is the most important element of a conference. Consider pre-start coffee and croissants. At a minimum, aim for a 30 minute morning break, 30 minute afternoon break, and 90 minutes for lunch (shorter if it's provided on-site and there is no exhibition).
- People often attend conferences so they can network – create that opportunity. Bear in mind that if you have exhibitors and sponsors in attendance, they will want a chance to speak with your delegates. After all, this is why they are there. They will also support future events if they can demonstrate the return on their investment by meeting lots of delegates.
- Set up coffee stations by the posters and/or sponsor exhibitions. Introduce facilitated poster review sessions – augmented the exercise with a prize for the best poster presented by a young scientist.
- Have a late start the morning after the conference dinner (have a conference dinner!).
- Be sure to schedule talks and sessions so presentations are grouped in a natural way while avoiding too many similar talks in a row. Run concurrent sessions that focus on different topics/fields at larger events.
- Where possible, give your delegates the opportunity to determine some of the programme by including an "Emerging Trends in..." or "New Developments in..." component.
- Finally, end the programme on a high note. Go for a motivational speech or a challenge to the attendees.

*"Meetings don't have to be endless to seem eternal."*  
James E. Faust

# BUDGET (Budget! Budget! Budget!)

One of the main responsibilities of an organising committee is to build a detailed and accurate budget. It is ill-advised to start implementing any of your planned activities without a realistic estimate of the amount of funding available. In many cases, aspects of your plan will need up-front payments long before you start recouping any monies through registration fees. Expect to have to make significant upfront payments for your marketing activities and deposits to reserve the venue and onsite facilities (catering).

Decide on the tools you are going to use to build and manage your budget plan. Start populating your expenses/income spreadsheet as soon as possible to ensure that you catch every expenditure. Establish expenditure categories and set budgetary limits up front and in clear agreement with everyone in your organising committee – making sure that those responsible for key activities are aware of their limits and the need for them to report regularly on expenditures. Good things cost money – so remember to reflect the value of the meeting in the delegate registration fee.

Points to remember:

- The cost of your conference will be proportional to the capacity of the venue – a good estimate of the number of attendees will provide you with a good estimate of your gate earnings.
- Try to set a budget that can be balanced without the support of sponsors. Many events are intended to generate profits for the professional organisation running the meeting. As best you can, plan to cover costs within your registration fees.
- Set aside 5% of your budget for unforeseen expenses.

## ITEMS FOR YOUR BUDGET PLAN

- Venue hire, wifi and audio-visual support, insurance (of all types).
- Onsite costs: food and refreshments, security and registration desk staffing, awards (junior prizes and fellowships) and flowers, badges, programmes and invitations.
- Delegate costs: speaker fees and expenses, organising committee expenses.
- Marketing costs: website, materials design, administration of registration.

## SPONSORSHIP

Sponsorship can be an important source of funding and can mean you don't have to rely on registration fees alone to break even. Sponsorship can signal the difference between a good meeting and a truly great experience for one and all. They can also make a significant contribution when it comes to promoting your event, boosting registrations. But be reasonable and realistic when setting costs for sponsorship opportunities – remember you are looking for patronage.

With sponsorship available you can consider engaging professional support to design your event branding, website and signage as well as considerations for catering, the meeting pack, audio-visual support etc – all of which will improve the attendee experience.

Develop a sponsorship plan that details the sponsorship opportunities, the price of sponsorship and potential sponsors. It is often possible to find a single sponsor for your event (and that provides you with a simple solution) but that may come with some provisos. Sponsors may want to have a say in the content of the conference, host presentations or even have their own speakers. The least you will be expected to allow is their logo on promotional materials and they are likely to want exclusive access to exhibition space (basically the opportunity to interact with your delegates).

Exhibition space can be a lucrative source of sponsorship. However, you can only provide as many stands as your venue has space for – make sure you take a realistic account of the space you have to play with when you perform your site visit.

# MARKETING / PROMOTION

When it comes to attracting attendees (and sponsors) to your conference, simple invitations and an email campaign are not going to cut the mustard. All event planners agree that powerful marketing tools deployed to entice people to attend your event are an essential aspect of conference development. Once you have a handle on your agenda and speakers you can create your marketing plan and start developing your promotional materials. You may want to consider creating a professional logo and a catchy name for your event (if the budget allows).

Start the process of promotion as early as possible with a 'Save the Date' notification. This will give the busiest among those interested in attending a chance to note the date in their diaries.

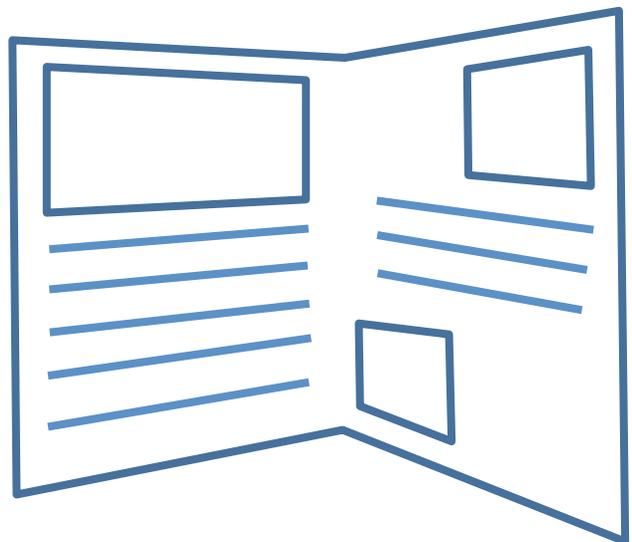
## CREATE AN ATTENTION-GRABBING WEBSITE

It is now virtually mandatory for you to provide an online page to support your event. It serves as a focal point for all other activities allowing you to provide information on attendees, activities during the event, background information and promotional blogging activity.

- Find an available domain – try to include the conference name or a meaningful derivative.
- Clearly provide key details – date of the conference, the theme, location, name of influential speakers and industry-leading participants, travel details and updates.
- Registration information – registration process, costs and concessions (you can also manage payments).
- Update the website regularly – keep your audience interested by providing new information on activities, scope and attractions as the conference draws closer.

Remember to provide the URL for your website on any promotional material. Post a final report of the event when everything else is complete.

There's a wide variety of affordable ways to stimulate interest, particularly if you have the support of the professional association that represents your industry or specialist area. These can include email campaigns to members, social media activity, blogs and advertising on your association's website and in their news bulletins. Build a strong online presence. Create a Twitter account and a hashtag for your event 2-4 months beforehand. Invite your speakers and collegiate to blog about and share their involvement through social media channels to boost its profile.



Remember that marketing doesn't end after the meeting. Your eagerness to shout about the positive outcomes from your meeting will impact on the speaker quality and sponsorship you will be able to attract to your next meeting. Find some way of marking the success of your event in the form of a press release, conference report or publication – be sure to mention plans for the next meeting.

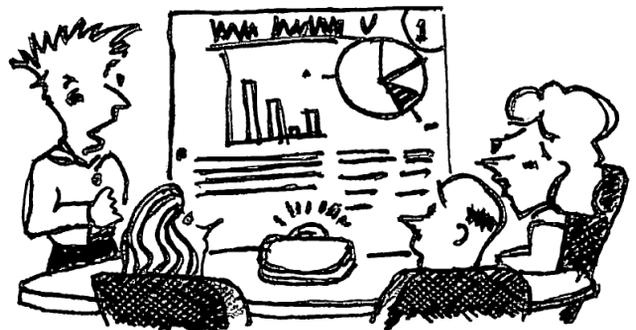
# ON SITE

All your planning comes to fruition on the day of the conference. Be prepared for your best laid plans to change with a site deployment plan, facilities checklist and eventualities action plan.

- Ensure your wireless setup has enough bandwidth – this is often the #1 complaint of conference attendees.
- Have signs that show the locations of each room, including restrooms, and the registration booth, etc. as well as maps of the building and surrounding area (another sponsorship opportunity!)
- Every morning, before sessions start, have a few slides rolling automatically on the screen with useful information and program updates.
- Set up a bulletin board so participants can post messages to each other.
- Have assistants available to help speakers get setup and to preview their talks and make any last minute changes.
- Have someone taking formal notes at all the sessions so you have the option to create a record of the proceedings.
- Take photographs throughout the event to post on your website – this also helps with promoting the next event and gives the next organiser a useful record of what things looked like.
- Have backups for everything: projectors, microphones, laser pointers, batteries, wet wipes etc.
- Print tickets for any special events and distribute them at registration to make logistics at said events a little easier.
- Please don't provide conference-themed coffee mugs / tote bags / backpacks. Most of them will be left in the trash at the hotel room. But remember that in some cases these represent unique sponsorship opportunities for your conference.
- Identify at least one team member to be responsible for working on promoting your event profile on the day; using Twitter and hashtags to post pictures and updates on the various different aspects of the meeting.
- Remember that the event doesn't end when the delegates leave. Allocate time and resources (people) to dismantle the event and help with clearing the venue (it could affect your venue deposit). And mark the completion of the event with some form of celebration for the delivery team – however modest – the thought will be appreciated.

## WHEN PRINTING NAMETAGS

Don't bother with the conference name and date (we all know what conference you're at!) and use large font for the participants' surname. If you can, print on both sides since they almost always flip around. Remember, people come to network – help them get the most out of the conference.



*"You know, I don't know what's worse... you, Mary, sleeping through my presentation, or you, Fred, complaining that it was keeping you awake."*

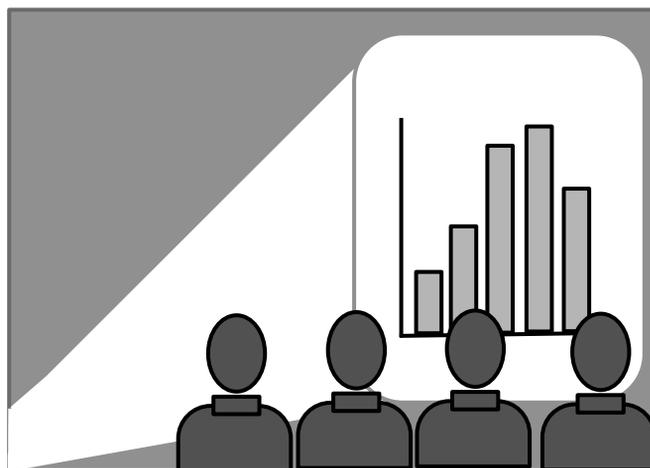
# AN INTERVIEW WITH OUR BUSINESS MANGER....



What was the most important tip anyone ever shared with you?



Come the day it can be particularly difficult to deal with those eventualities you didn't plan for. These might be specific incidents where you have no resources left to deploy (as everyone is doing their allocated job) and have the greatest potential to mess up your plans. One of the simplest wins is to keep strict timing. It is one less thing to worry about. Identify someone to be responsible for keeping the meeting on track with a gentle nudge and a quiet word (and perhaps more if necessary).



What is your pet hate?



It may be that we are becoming more environmentally aware but I have come to dislike the use of worthless giveaway sponsorship opportunities. For example, one conference I have attended several times over the last few years always include a plastic duck in the registration pack. It has become a running joke for regular conference attendees. But in the end, they all end up in the trash – environmentally irresponsible. Spend time coming up with worthwhile, creative and pleasing options that will be welcomed by sponsors and valued by your delegates.

## AND FINALLY (after the meeting)....

Wrap up the conference properly by giving credit to everyone who helped to make the event a success. If you have awards to present, this is the right time for presenting any awards. Dedicate some time to thank your speakers and collect feedback about the event from the delegates through questionnaires. This information will help you to understand the strengths and weaknesses of your conference and give you the opportunity to improve possible future events.

Published proceedings are the best way to make a lasting impression for your event. Negotiate with journals far in advance of the conference to publish the proceedings. The publishability of the proceedings should be a point of consideration when you are selecting your overarching theme at the start of your journey. Make those proceedings as widely accessible as possible by looking for open-access journals/publications. Upload photos and videos of the event to the conference Web site and post a short report and the names of presenters and those who received awards and travel fellowships.

Once all the dust has settled send one last e-mail to all delegates, including a summary of the activities since the conference and thanking them for their participation and inviting them to register for information on the next event. This is particularly important if you are considering holding the conference again next year.

# References

1. Ponomarenko J, Garrido R, Guigó R. Ten Simple Rules on How to Organize a Scientific Retreat. PLoS Comput Biol 2017;13(2): e1005344. <https://doi.org/10.1371/journal.pcbi.1005344>
2. JR Hackman, M O'Connor. What Makes for a Great Analytic Team? Individual vs. Team Approaches to Intelligence Analysis. Intelligence Science Board, Office of the Director of Central Intelligence 2004.
3. J Useem. How to build a great team. FORTUNE Magazine June 1, 2006.

## Next steps

We created this Insider's Insight into organising event to share a few helpful pointers and learnings that we have gained over the years. If you are interested we would be happy to share more of our experience with you and discuss how you can get more out of your presentations.

I hope that you found our guide useful. If you would like to discuss support for any of your upcoming presentation challenges please contact me using the email address below:

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