

## CMP-IS Document

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The CMP International Standards (CMP-IS) are the body of knowledge for the Certified Meeting Professional program and examination. The CMP-IS defines and categorizes the skills, competencies and abilities an individual needs in order to be successful in the profession. The CMP-IS represents the most significant enhancement to the CMP body of knowledge since the start of the CMP program in 1985. Meeting professionals familiar with previous versions of the body of knowledge will not see radical changes to the skills and competencies, but there are several key ways the CMP-IS improves the CMP program:

- Updating to reflect current practices and occupational requirements to maintain a relevant examination and certification
- To provide direction to those seeking the certification of the knowledge and skills covered on the exam
- Insuring relevance and applicability to meeting professionals worldwide
- Creating a body of knowledge for the CMP program that is truly global in nature
- Enhancing the level of detail used when describing and categorizing tasks and skills
- Aligning the body of knowledge with other international standards
- Recognizing that the CMP body of knowledge represents a credible standard of competency

## CMP-IS Frequently Asked Questions

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### **Why is the CMP Blueprint changing?**

For any profession the skills, abilities and competencies required change over time. In keeping with policy and industry best practices, CIC conducts a review of the CMP program's body of knowledge every five years. This review insures that the program remains relevant, up-to-date and credible.

### **Why's it being called the CMP International Standards?**

The change in name reflects the many updates and enhancements that have been made, such as:

- Updating the existing body of knowledge
- Enhancing the level of detail used when describing and categorizing tasks and skills
- Clarifying the body of knowledge and test specification into separate documents
- Insuring relevance and applicability to meeting professionals worldwide
- Aligning the body of knowledge with other international standards
- Recognizing that the CMP body of knowledge represents a credible standard of competency

### **What's the difference between the old CMP Blueprint and the new CMP International Standards?**

For many years the CMP program has used the CMP Blueprint as the both a body of knowledge and a test specification. Best practices suggest that these should be individual documents, and CIC used the current review cycle to separate the documents.

A body of knowledge defines and categorizes the skills, competencies and abilities required by an individual in order to be successful in a given profession. The CMP International Standards are the body of knowledge for the Certified Meeting Professional program.

A test specification presents an outline for the makeup of examinations that test on a body of knowledge. The major function of the CMP Blueprint was as a test specification. Test specifications summarize the various domains in a body of knowledge, and their percentage representation on any given examination.

**When does this take effect?**

The CMP International Standards will go into effect in 2012. For candidates planning to sit for the exam, the CMP International Standards will go into effect after the January 2012 exam.

**How do the changes affect current candidates studying for the examination?**

Generally speaking, candidates will not see sweeping changes in the body of knowledge. The majority of differences will be in where skills and competencies appear, and the level of detail used.

More specifically, for candidates preparing for the examination:

For examinations through 2011 and up to and including January of 2012, the guiding document will be the CMP Blueprint.

For examinations beginning July of 2012, the guiding document will be the CMP International Standards

**Will the CIC Manual be revised?**

After each review of the CMP body of knowledge CIC reviews its publications for revision. In this instance a new edition is planned. The publication date is not available at this time. More details will be posted on the CIC web site, [www.conventionindustry.org](http://www.conventionindustry.org) as they become available.



# International Standards



Convention  
Industry  
Council

## About the Convention Industry Council

The Convention Industry Council's 30 member organizations represent over 103,500 individuals and 19,500 firms and properties involved in the meetings, conventions, and exhibitions industry. The mission of the Convention Industry Council is to provide a forum for member organizations to exchange information on global trends and topics, promulgate excellence in best practices and guidelines, collaborate on industry issues and advocate the value of the meetings, conventions, exhibitions and events industry.

## About the Certified Meeting Professional

The Certified Meeting Professional (CMP) program aims to increase the professionalism of meeting management professionals in all sectors of the industry. CMPs can manage a variety of meetings because they are knowledgeable about meeting management and about the goals and objectives of the groups with whom they work. They come from a variety of industries: tourism, accounting, trade associations, education, small business, medical, financial services, hotel, communications and technology, religious, meetings and trade shows, government, sports, and recreation. They also have a variety of job roles: show organizer, meeting planner, marketing, program development, logistics manager, event and/or exhibit sales, sponsorship, destination marketing, hotel sales, merchandise, attendance sales, financial, membership, travel planner, registration, exhibits manager, procurement (e.g., government), site selection, contract manager, education (program development related); technology management; and social media.

## About the CMP International Standards

The CMP International Standards (CMP-IS) are the *body of knowledge* for the Certified Meeting Professional program and examination. The CMP-IS defines and categorizes the skills, competencies and abilities an individual needs in order to be successful in the profession.

The CMP-IS represents the most significant enhancement to the CMP body of knowledge since the start of the CMP program in 1985. Meeting professionals familiar with previous versions of the body of knowledge will not see radical changes to the skills and competencies, but there are several key ways the CMP-IS improves the CMP program:

- Updating to reflect current practices and occupational requirements to maintain a relevant examination and certification
- Insuring relevance and applicability to meeting professionals worldwide
- Creating a body of knowledge for the CMP program that is truly global in nature
- Enhancing the level of detail used when describing and categorizing tasks and skills
- Aligning the body of knowledge with other international standards
- Recognizing that the CMP body of knowledge represents a credible standard of competency

## Development of the CMP International Standards

The CMP International Standards is the result of a multi-year project that involved many stakeholders including subject matter experts, educators, and CMP designation-holders.

Periodically, a study is conducted to make sure that the Certified Meeting Professional (CMP) examination is current. The Convention Industry Council commissioned a job analysis conducted by Prometric for the Certified Meeting Professional. A job analysis is designed to obtain descriptive information about the tasks performed in a job and the knowledge needed to adequately perform those tasks. The major purpose of the job analysis is to update the tasks and knowledge/skills that are important for competent performance by Certified Meeting Professionals. The development of a content-valid examination is based on validated tasks and knowledge/skills identified through the job analysis process.

In developing the CMP-IS, CIC partnered with the Canadian Tourism Human Resource Council (CTHRC), which completed a job analysis in 2009 for their standard, "Event Management - International Competency Standard". The project also utilized Meeting Professional International's (MPI) *Meetings and Business Events Competency Standard\** (MBECS), which is also aligned with CTHRC's competency standards. These resources were used alongside CIC's analysis including the then-current standard, the *CMP Blueprint*.

\*The *Meeting and Business Event Competency Standards* were identified by Meeting Professionals International (MPI) through a systematic process that included the establishment of a Body of Knowledge Task Force, the line-by-line review of the standards developed by the Canadian Tourism Human Resource Council (known as the *Event Management - International Competency Standards*), and a public comment period on the draft standards for members of the industry.

## Terms found in the CMP International Standards

Here is an explanation of how to understand and apply the information provided in the CMP International Standards (CMP-IS). The CMP examination contains questions covering the variety of functions a meeting professional must perform based on this document.

**Body of Knowledge:** A body of knowledge defines and categorizes the skills, competencies and abilities required by an individual in order to be successful in a profession

**Test Specification:** A test specification presents an outline for the makeup of examinations that test on a body of knowledge

**Domain:** CMP-IS knowledge base areas

**Skill:** The defined task under the knowledge based domain

**Common Knowledge:** General knowledge relevant to the skill

**Sub Skill:** Specific functions needed to perform the skill

**Knowledge:** Minimum level of comprehension and understanding of the sub skill

**Ability (Know how to):** The competence to apply the knowledge

The CMP International Standards are comprised of 10 Domains, 30 Skills, and 106 Sub Skills.

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## Skill 1: Manage Strategic Plan for Meeting or Event

Exam Questions in Domain A . . . . . 24  
Questions in Skill 1 . . . . . 6-8

### COMMON KNOWLEDGE

- Basic business management skills
- Trend Analysis and forecasting methods
- Methods to analyze and interpret data

### SUB SKILL 1.01 - DEVELOP MISSION STATEMENT, GOALS AND OBJECTIVES OF MEETING OR EVENT

#### KNOWLEDGE

- purpose and objectives for meeting or event
- mission statement, goals and objectives of organization and stakeholders
- target market(s)
- type of geographic location and local culture envisaged by organization
- type of meeting or event envisaged by organization, e.g., spectator, participatory
- sustainability objectives, e.g., financial, environmental, social
- financial resources that may be available
- target date(s)
- cross-cultural issues, e.g., holidays
- special conditions

#### ABILITY (KNOW HOW TO)

- work with, communicate and understand stakeholder goals
- develop mission statement to specify purpose, philosophy and target markets
- create goal statements to specify how meeting or event will achieve its mission
- establish objectives to specify actions, time frames and performance measurements needed to achieve goals
- align mission statement, goals and objectives of meeting or event and organization/stakeholders
- manage cross-cultural issues

### SUB SKILL 1.02 - DETERMINE FEASIBILITY OF MEETING OR EVENT

#### KNOWLEDGE

- meeting and event industry, including emerging trends
- research methods suitable to ascertain viability of meeting or event
- applicable legislation and regulatory requirements (need to know to find out what the requirements are)
- sources of potential revenue
- timeline constraints

#### ABILITY (KNOW HOW TO)

- keep information about meeting or similar events including historical data, e.g., surveys, evaluations
- evaluate similar or competitive events
- network with resource people, e.g., previous hosting committees/communities, service groups, suppliers
- identify legal and regulatory requirements
- conduct market research, i.e., survey(s)
- determine short-, medium- and long-term economic and social impacts on hosting community (e.g., focus on understanding of impact of limited events and their impacts)

—continued

- societal trends (e.g. regardless of what the trends are, it is more important to recognize will have impact on meeting or event)

- develop profile of potential attendees
- analyze costs and benefits
- decide on complexity of meeting or event, e.g., size, duration, number of activities, service requirements and attendees
- assess risk components
- specify potential sources of revenue and other resources
- define opportunities for strategic alliances, e.g., with existing facilities and events
- recommend to organization/stakeholders whether or not to proceed with meeting or event
- identify potential stakeholders

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### SUB SKILL 1.03 - DETERMINE REQUIREMENTS TO CARRY OUT MEETING OR EVENT

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#### KNOWLEDGE

- meeting or event requirements, e.g., human resources, marketing, logistics/operations
- legal and regulatory restrictions (including political)
- cost/benefit analysis
- tools or resources available for meeting or event planning, e.g., technology

#### ABILITY (KNOW HOW TO)

- identify requirements based on scope of meeting or event, for example: planning cycle, sponsorship opportunities, additional sources of resources, meeting or event evaluation, administrative needs, leadership and management, logistics and operations structure, cross-cultural needs, marketing, human resources, e.g., number of people, wage rates, meeting or event timing, location and size, data flow, storage and manipulation, public relations, systems to track progress towards goals, e.g., sales to financial plan
- research options available to meet requirements
- evaluate costs and benefits for options available
- select and record best options/strategies
- obtain support and involvement of organization in strategic planning

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### SUB SKILL 1.04 - DEVELOP FINANCIAL SUMMARY

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#### KNOWLEDGE

- types of financial information required for a strategic plan
- tools or resources for financial planning, e.g., spreadsheets, software
- options available to meet needs and respective costs, e.g., contract and employment situations for personnel
- foreign currency implications

#### ABILITY (KNOW HOW TO)

- compile (gather/collect) financial information, for example: financial results, current financial position, sources and applications for funding, current balance sheet details, e.g., assets, liabilities, equity, statement of operational costs, cash flow statements, projected closing balance sheets, break-even analysis, projected return on investment, applicable taxes or levies
- seek professional assistance as required, e.g., accountant, banker
- understand impact of foreign currency

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## SUB SKILL 1.05 - MONITOR STRATEGIC PLAN

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### KNOWLEDGE

- mission statement, goals and objectives of organization
- financial plan
- logistics and critical path
- inter-relatedness of all aspects of meeting or event
- potential impact of changes on all other aspects of meeting or event

### ABILITY (KNOW HOW TO)

- compare meeting or event progress to mission statement, goals and objectives
- monitor cash flow to determine financial standing
- identify financial resources
- analyze all data available when deciding to change course
- record change control details, e.g., date, rationale, implementation plan e.g., document the need for changes as part of the process; when later review of strategic plan, have support for changes made
- seek professional assistance as required, e.g., accountant, banker
- suggest changes or revisions to strategic plan, if needed, with organization and/or key stakeholders

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## Skill 2: Develop Sustainability Plan for Meeting or Event (e.g., corporate social responsibility, environmental sustainability)

### COMMON KNOWLEDGE

- Concepts of sustainability, i.e., integration of economic, social and environmental considerations in meeting or event planning
- Capacity planning and need for growth
- Mission statement, goals and objectives of organization
- Inter-relatedness of all aspects of meeting or event
- Target market(s)

Questions in Skill 2 . . . . . 9-11

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## SUB SKILL 2.01 - IMPLEMENT SUSTAINABILITY MANAGEMENT PLAN

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### KNOWLEDGE

- geographic location, local populations, their culture(s) and history
- local issues and concerns, e.g., social, economic, environmental
- meeting or event concept and image
- sustainability standards for meeting or event, e.g., ISO 20121, BS8901, APEX/ASTM standards; Global Reporting Initiative (GRI)

### ABILITY (KNOW HOW TO)

- review evaluations and feedback from previous and/or similar meetings or events
- consider potential short- and long-term impacts of meeting or event
- determine needs for sustaining meeting or event, e.g., systems, quality control
- comply with legislation, e.g., environmental, local zoning, human rights, health and safety, labor, political
- select strategies to create positive outcomes and mitigate negative impacts of meeting or event, for example: support initiatives for community development, e.g., infrastructure, social programs, utilize local residents, use local and fair-trade goods and services, protect cultural and historical sites
- align sustainability practices with existing organizational process(es), if required

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## SUB SKILL 2.02 - DEMONSTRATE ENVIRONMENTAL RESPONSIBILITY

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### KNOWLEDGE

- environmental issues and concerns of local area
- environmental capacity of community, e.g., waste management infrastructure
- current environmental technology and practices
- impact of decisions on measurement of environmental impact

### ABILITY (KNOW HOW TO)

- integrate environmental awareness into meeting or event management
- apply conservation practices, for example: reduce energy use, reduce water consumption
- implement recycling programs, for example: purchase recyclable products, set up recycling systems
- reduce pollution, for example: minimize noise and light pollution, control use of harmful substances, e.g., chemicals, paints
- seek an environmental expert

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## Skill 3: Develop Business Continuity or Long-Term Viability Plan of Meeting or Event

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Types of research and evaluation appropriate for all aspects of meeting or event
- Return on investment methods
- Concepts of sustainability, i.e., integration of economic, social and environmental considerations in meeting or event planning
- Capacity planning and need for growth
- Mission statement, goals and objectives of organization
- Inter-relatedness of all

Questions in Skill 3 . . . . . 6-8

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## SUB SKILL 3.01 - DEVELOP EVALUATION PLAN

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### KNOWLEDGE

- meeting or event objectives
- stakeholders

### ABILITY (KNOW HOW TO)

- define return on investment objectives/expected outcomes, e.g., efficiency, effectiveness, accountability, justifying investments
- decide what data will be collected, e.g., costs, attendee feedback
- determine timing and sequencing of data collection
- identify resource requirements

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### SUB SKILL 3.02 - MEASURE RETURN ON INVESTMENT

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#### KNOWLEDGE

- data collection methods
- data analysis
- quantitative and qualitative values

#### ABILITY (KNOW HOW TO)

- collect data, e.g., evaluation-related, attendance, financial
- analyze data
- present/report data

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### SUB SKILL 3.03 - EVALUATE/AUDIT MEETING OR EVENT

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#### KNOWLEDGE

- information management plan, e.g., available sources of information
- integrated communication plan
- extent of responsibility for evaluation
- information analysis processes
- methods and principles of evaluation
- basic accounting principles that are global in nature
- sources of information, e.g., plans, budget, variance reports, progress reports
- data collection methods

#### ABILITY (KNOW HOW TO)

- review critical success factors for meeting or event, i.e., benchmarks
- implement evaluation/audit procedures as scheduled, for example: collect and analyze information, verify validity and reliability of information, identify and report any difficulties accessing information, identify and address irregularities
- evaluate information, e.g., identify reasons for success/failure and key lessons for future meetings or events
- develop report, for example: detail information used and information sources, explain how information has been analyzed, draw conclusions and make recommendations based on evidence, use best format for organization, key personnel and stakeholders
- follow integrated communication plan for distribution of evaluation/audit report and confidentiality guidelines
- debrief internal and external stakeholders

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### SUB SKILL 3.04 - EVALUATE EFFECTIVENESS OF RISK MANAGEMENT PLAN

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#### KNOWLEDGE

- risk management plan
- risk management strategies and techniques
- applicable legislation, e.g., fire, liability, public health, environmental protection

#### ABILITY (KNOW HOW TO)

- collect and evaluate information on how risks were dealt with
- monitor use of resources allocated to risk management, for example: ensure sufficient resources are available
- identify areas for improvement
- inform key personnel of effectiveness or deficiencies of techniques and strategies, and identify necessary action to be taken
- make changes to risk management plan as needed
- communicate to stakeholders as needed

## Skill 4: Plan Meeting or Event Project

Exam Questions in Domain B . . . . . 22  
Questions in Skill 4 . . . . . 11-13

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event or organization
- Types of research and evaluation appropriate for all aspects of meeting or event
- Meeting or event details, e.g., features, critical path
- Scope and requirements of meeting or event, e.g., human resources, marketing, logistics/operation

### SUB SKILL 4.01 - DEVELOP PROJECT PLAN

#### KNOWLEDGE

- target market(s)
- meeting or event planning tools, e.g., Gantt chart, software, APEX tools, flowchart, timelines
- stakeholder requirements
- processes to deliver meeting or event
- possible constraints or conditions, e.g., regulations
- types of event and meeting formats
- stakeholder profile (e.g., attendee, exhibitor, sponsor)

#### ABILITY (KNOW HOW TO)

- review historical data, e.g., previous project plan(s) in order to: identify strengths and weaknesses, review goals and objectives, and to compare results to goals and objectives
- develop processes that will contribute to achieving goals
- specify the actions, time frames and performance measurements needed to achieve objectives
- identify resources required and available, e.g., financial, material, staff
- involve relevant stakeholders in planning process, for example: include attendees, conduct exploratory research, seek peer reviews

### SUB SKILL 4.02 - DEVELOP QUALITY STANDARDS, POLICIES AND PROCEDURES

#### KNOWLEDGE

- meeting or event industry (national and international) standards
- research methods
- organizational standards and policies

#### ABILITY (KNOW HOW TO)

- review legal, regulatory, ethical, political and social requirements for meeting or event
- examine existing standards, policies and procedures
- develop contracts or develop related contract language re quality
- define areas requiring standards, policies or procedures
- conduct research
- obtain expert advice and information when necessary (including legal)
- gain support of organization and key stakeholders

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## SUB SKILL 4.03 - DEVELOP THEME FOR MEETING OR EVENT

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### KNOWLEDGE

- range of creative, promotional, technical and operational options
- key stakeholders
- budget parameters
- target market(s)
- marketing and public relations options
- destination branding and brand management
- program objectives
- cross-cultural elements

### ABILITY (KNOW HOW TO)

- determine stakeholder expectations, for example: research target market(s), analyze post-event reports, research attendee expectations
- generate ideas, e.g., brainstorm, network
- conceive a meeting or event theme that will complement or integrate with organization's marketing and brand strategy
- meeting or event from participant/spectator perspective
- engage expertise if required, e.g., marketing firm, consultant
- conceptualize theme, for example: identify core concepts, topics or messages, create appealing images, e.g., logo, identify means to integrate theme into all aspects of meeting or event. involve stakeholders, e.g., consider requirements of sponsors, consider cultural environment and norms, identify destination attributes
- integrate branding and theme imagery into aspects of meeting or event experience

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## SUB SKILL 4.04 - DEVELOP PROCUREMENT PLAN (ACQUISITION OF GOODS AND SERVICES)

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### KNOWLEDGE

- how to conduct a cost/benefit analysis
- request for proposal process
- organizational strategies and policies

### ABILITY (KNOW HOW TO)

- evaluate past patterns of resource use, trends and developments
- identify need for supplementary products and services, including required range (types of services) and quantity
- research options available to meet needs that minimize risk
- assess costs and benefits for options available
- select best options/strategies, e.g., purchase or rent equipment, issue a request for proposals for services
- adjust activities if products/services are not available
- record best options/strategies and financial information
- evaluate and determine best method for securing services, e.g., housing, accommodations, transportation, audio-visual

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## SUB SKILL 4.05 - ESTABLISH MILESTONES AND CRITICAL PATH

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### KNOWLEDGE

- tasks and phases (stages) required for meeting or event (e.g., pre-, during, post-)
- interdependence of tasks and phases (stages)
- schedule development and revision
- planning and managing projects

### ABILITY (KNOW HOW TO)

- identify specific, realistic, measurable and achievable tasks and phases required to achieve meeting or event objectives
- set goals and objectives
- prioritize goals and objectives
- determine links, dependencies, timelines and critical dates
- estimate durations of tasks
- assign tasks to specific committees or individuals
- schedule regular review of critical path
- identify potential risks
- adjust critical path as needed

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## SUB SKILL 4.06 - DEVELOP INTEGRATED COMMUNICATION PLAN

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### KNOWLEDGE

- applicable legislation, regulations, customs and internal policies concerning communication issues, e.g., intellectual rights, privacy, proprietary information, cultural/political
- organizational structure
- strategic plan and goals
- differences (e.g., priorities, views) of respective stakeholders, e.g., intra-departmental, project team, external, individuals with special needs, language differences
- marketing, public relations, and communications plan
- policies related to system security

### ABILITY (KNOW HOW TO)

- design meeting or event communication plan that will complement or integrate with organization's communication plan, internal organization's plan and external stakeholders' plan
- establish standardized documentation and document design procedures
- use information retrieval systems
- create information collection policies, procedures and structures
- construct information distribution policies, procedures and structures (e.g., who gets the information)
- generate policies and procedures to maintain system security and integrity, e.g., develop privacy policy, develop accessibility policy
- set up data reporting and monitoring systems
- establish record-keeping and filing systems
- develop information preservation and archiving policies and procedures
- create plan for site communication, e.g., tools to be used for site communication, protocols, emergency contacts, risk management plan, on-site logistics
- source and select technology for site communication
- analyze and select different technologies for storage, e.g., database, paper filing system

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## SUB SKILL 4.07 - DEVELOP EVALUATION/AUDIT PROCEDURES

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### KNOWLEDGE

- evaluation processes and procedures
- basic accounting principles that are global in nature
- setting measureable objectives
- meeting or event-related elements or activities that may be evaluated/audited before, during and after meeting or event
- stakeholder requirements

### ABILITY (KNOW HOW TO)

- define purpose of evaluation/audit
- identify areas to be evaluated, e.g., mission, goals, program, sponsorship program, attendance, finances
- determine critical success factors for meeting or event, i.e., benchmarks
- identify evaluation/audit procedures, for example: determine who will conduct evaluation/audit, identify information required for evaluation/audit, e.g., plans, budgets, variance reports, progress reports
- select date(s) for implementation
- establish reporting process

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## Skill 5: Manage Meeting or Event Project

Questions in Skill 5 . . . . . 9-11

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Organizational policies and procedures
- Organizational structure

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## SUB SKILL 5.01 - MANAGE CRITICAL PATH

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### KNOWLEDGE

- critical path and review schedule

### ABILITY (KNOW HOW TO)

- identify specific tasks and projects required to achieve mission, goals and objectives of meeting or event
- prioritize tasks and projects
- determine timelines and critical dates
- create meeting or event briefs outlining relevant information for specific stakeholders, e.g., committee members, suppliers, agencies, project team
- assign tasks to specific groups or individuals based on skills or areas of expertise
- schedule regular review of critical path, for example: assess variations between estimated and actual time, analyze resource deficiencies and overages
- take corrective action based on results of review
- keep key personnel informed of progress and changes

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## SUB SKILL 5.02 - MANAGE CONTRACTS

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### KNOWLEDGE

- principles of negotiation, stages of negotiating process and different negotiation techniques
- components of legal contracts (note including contracts across borders)
- meeting or event and organization's requirements

### ABILITY (KNOW HOW TO)

- identify requirements for contract, for example: prepare specifications
- communicate request for proposal process to potential suppliers of goods and services
- evaluate proposals against criteria
- negotiate contracts, for example: strive for beneficial outcomes for all parties involved, determine what is negotiable and non-negotiable, explain organization's position and viewpoint, listen to and validate other parties' positions and viewpoints, discuss options, agree on most viable options, e.g., service, timelines, decide on sources of information for evaluation
- consult legal opinion, if needed
- integrate contractual obligations into meeting or event's critical path
- maintain productive relationship with contractors: monitor progress on a regular basis to ensure organization and contractors are fulfilling obligations, agree on action to rectify non-compliance, deal with breaches of contract within acceptable time frame
- assess contractors' performance to identify strengths and weaknesses
- monitor contractors' expenditures against contract
- compare organization's performance against contract (evaluate own performance)

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## SUB SKILL 5.03 - MANAGE IMPLEMENTATION OF MEETING OR EVENT

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### KNOWLEDGE

- critical path and schedule
- on-site resources and personnel
- on-site meeting or event management
- integrated communication plan

### ABILITY (KNOW HOW TO)

- follow agreed-upon event specifications guide for meeting or event
- maintain flow/sequence of activities during meeting or event
- ensure all resources, personnel and supports are in place and ready
- make sure all personnel are briefed, e.g., submit event specifications guide to key stakeholders, as appropriate
- provide authorizations for elements of meeting or event to take place, where necessary
- receive and distribute funding
- oversee the work of key personnel and other stakeholders throughout meeting or event, for example: follow integrated communications plan
- implement risk management techniques and strategies to minimize disruption to participants and attendees and to deal with problems that arise
- keep key personnel informed of progress and changes
- maintain records

## Skill 6: Manage Risk Management Plan

Exam Questions in Domain C . . . . .12  
Questions in Skill 6 . . . . .12

### COMMON KNOWLEDGE

- Meeting or event plans, e.g., critical path
- Common risk factors
- Common risk management procedures
- Mission statement, goals and objectives of meeting or event and organization

### SUB SKILL 6.01 - IDENTIFY RISKS

#### KNOWLEDGE

- research methods
- importance of risk management
- organizational resources

#### ABILITY (KNOW HOW TO)

- review meeting or event plan, e.g., type of meeting or event, location of meeting or event, time of year, time of day, duration of meeting or event, profile of attendees, number of attendees
- review any investigations of previous incidents
- determine scope and nature of legal, ethical and regulatory obligations: consider range of legal and regulatory issues, e.g., contracts, determine jurisdictions responsible, e.g., national and local governments, identify legislation, codes, ordinances, mandates and regulations, applicable to meeting or event and its operations, identify authorities, agencies or governing bodies responsible, determine process for acquiring authorizations
- consult with other relevant individuals, e.g., colleagues, clients, contractors, performers, legal, security personnel, venues
- evaluate venue and geographic location for potential hazards, threats, vulnerabilities or other risks
- assess the need for specialist advice or assistance in addressing legal, regulatory and jurisdictional requirements
- conduct risk assessment

### SUB SKILL 6.02 - ANALYZE RISKS

#### KNOWLEDGE

- authorities, agencies and governing bodies that preside over specific activities within a jurisdiction

#### ABILITY (KNOW HOW TO)

- determine: what is exposed to damage, loss or liability, e.g., property, persons, cash, reputation, environment, what could cause damage, loss or liability, who could suffer damage, loss or liability, when damage, loss or liability might occur
- assess: probability of occurrence, severity of consequences, e.g., extent of impact, financial consequences, maximum possible loss or liability
- prioritize risks, considering: organization's tolerance for risk, jurisdiction's mandates regarding risk, mitigate or transferring risk
- consider effectiveness of risk management techniques

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## SUB SKILL 6.03 - DEVELOP MANAGEMENT AND IMPLEMENTATION PLAN

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### KNOWLEDGE

- authorities, agencies and governing bodies that preside over specific activities within a jurisdiction
- risk analysis
- organizational structure
- legislation, regulations and possible impacts on plan
- location situational analysis
- risk management options, for example: loss prevention, e.g., security, incorporation, copyright, risk financing, e.g., insurance, payments, liens, financial reserves, risk control, e.g., safety precautions, safety training, maintenance programs

### ABILITY (KNOW HOW TO)

- evaluate options to meet legal requirements and mitigate risks, for example: seek advice from regulatory authorities and specialists, put supports in place to minimize risks
- identify health and safety requirements: select available options to meet requirements
- prepare risk management plan, including: chain of command, emergency and control procedures, spokesperson, implementation strategies, e.g., decision-making authority, resource requirements, coordination requirements
- implement plan to manage risks
- communicate plan and procedures, e.g., to emergency services, media, suppliers, senior management and staff
- assess risk management plan on ongoing basis
- comply with regulations, where applicable
- consult experts, where needed
- obtain insurance: review insurance coverage needs and levels periodically, update insurance coverage as needed

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## SUB SKILL 6.04 - DEVELOP AND IMPLEMENT EMERGENCY RESPONSE PLAN

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### KNOWLEDGE

- local-, organizational- and venue-specific emergency response protocols
- decision-making authority
- emergency response plan

### ABILITY (KNOW HOW TO)

- conduct a threat assessment to identify potential threats, hazards or emergencies, e.g., earthquake, disease outbreak, hazardous material spill, utility failure, bomb threat, structure collapse
- perform a capability assessment to determine resources available to respond to an emergency, e.g., medical, fire, rescue, security
- confer with authorities to determine requirements and appropriate emergency procedures, for example: access, egress and locations for emergency services, exit route configuration for site evacuation, on-site medical services required, e.g., number and locations of first-aid stations and emergency medical technicians, internal and external communication systems, roles, responsibilities, lines of authority and delegation of duties
- implement emergency response plans and communication procedures
- carry out contingency and business continuity plans as appropriate

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## SUB SKILL 6.05 - ARRANGE SECURITY

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### KNOWLEDGE

- risk analysis
- types of security alternatives
- emergency response plan

### ABILITY (KNOW HOW TO)

- determine needs, considering: type of meeting or event; hours of operation; type of venue; types of activities, e.g., serving alcohol; physical activities; number and nature of attendees and VIPs; number and nature of entrances and exits; traffic patterns; insurance requirements; type of property issues (e.g., theft)
- comply with legislation
- inform authorities—e.g., fire, police—of meeting or event time, dates and activities
- arrange for: security staff and facilities, training for staff and volunteers, accreditation for security staff
- attain certificates of insurance from security suppliers, for example: obtain additional coverage, as needed
- detail security procedures for emergency situations, for example: crowd control, protesters and/or picket lines, site evacuation, natural disaster, terrorist activities
- implement internal and external security communication systems
- establish system for reporting and recording incidents

# DOMAIN D. FINANCIAL MANAGEMENT

10%  
OF EXAM

## Skill 7: Manage Event Funding and Financial Resources (Note: organizations can be for-profit or not-for-profit)

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Applicable legislation and legally binding documents, e.g., contracts
- Meeting or event profile, features, budget and decision deadline
- Meeting or event plans, e.g., critical path
- Target markets
- Financial targets for funding
- Funding sources, e.g., grants, government programs, sponsors, registrations, products, exhibits

Exam Questions in Domain D . . . . .15  
Questions in Skill 7 . . . . .5-7

### SUB SKILL 7.01 - MANAGE SPONSORSHIP AND DONOR PROCESS

#### KNOWLEDGE

- sponsorship goals/targets including on-site and post-meeting or event deliverables
- sponsorship protocols, e.g., preferred method of communication
- sponsorship restrictions and constraints, e.g., regulations
- measurement procedures
- financial targets for donors
- public relations and marketing plan
- establishing partnerships and alliances
- previous donor list for event or meeting

#### ABILITY (KNOW HOW TO)

- establish sponsorship levels: identify financial or in-kind values for each level, define benefits for each level, estimate costs for providing benefits
- obtain support of key stakeholders for proposed sponsorship arrangements
- seek legal opinion as needed
- identify potential sponsors, considering: compatibility with meeting or event, exclusivity, income or cost-avoidance goals, advertising and budget limitations (to find sponsors)
- produce sponsor benefit packages containing: overview and history of meeting or event, corporate identity to be presented, e.g., use of logos, value for sponsorship, letter of proposal, audience demographics, return-on-investment measures and opportunities, sponsorship benefits and limitations, pre-event/meeting sponsorship restrictions
- distribute sponsor benefit packages to potential sponsors
- contact potential sponsors, e.g., primary decision-maker or person of influence: determine type of support available, e.g., cash, discounts, products; establish relationships with sponsors' creative agencies; negotiate sponsor commitment, e.g., distribution, product sales, set-up, tear-down, sampling
- consider how sponsors may complement or conflict with each other

—continued

- prepare contracts for committed sponsors, outlining: details of meeting or event, responsibilities of both parties, e.g., liabilities, personnel, entertainment, financial obligations, release forms and waivers, policy regarding meeting or event cancellation, insurance requirements
- maintain relationships with sponsors, e.g., provide regular updates
- manage contractual fulfillment, e.g., delivery of benefits
- follow up, e.g., evaluate sponsor involvement, return on investment from sponsors' points of view
- identify potential donors
- specify possible donor opportunities
- determine need for donor recognition
- develop donor recognition program, e.g., benefactor, friend, supporter
- coordinate approach for soliciting potential donors
- contact potential donors, for example: outline how donations will be used and expectations will be met, request specific contribution if appropriate
- implement donor recognition program
- carry out communications plan

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## SUB SKILL 7.02 - MANAGE GRANT FUNDING PROCESS

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### KNOWLEDGE

- financial targets for funding
- funding sources, e.g., grants, government programs, sponsors, registrations, products

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## SUB SKILL 7.03 - MANAGE REGISTRATION PROCESS

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### KNOWLEDGE

- financial targets for registration
- previous registration list for meeting or event
- registration system (e.g., internal/external, maximize use)

### ABILITY (KNOW HOW TO)

- identify potential attendees and types of attendees
- communicate attendee benefits in pre-registration information packet containing: overview and history of meeting or event, location of and cost to attend meeting or event, identity of meeting or event sponsor, educational value of attending, meeting or event agenda, criteria for acceptance of registration (if applicable), additional programming offerings, e.g., tours, spouse programming, hospitality
- identify potential supplier partners, i.e., application service provider, full-service registration contractor

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## SUB SKILL 7.04 - MANAGE EXHIBIT SALES PROCESS

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### KNOWLEDGE

- exhibit sales goals/targets including on-site and post-meeting or event deliverables
- protocols (e.g., methods of communication)
- regulations (security and safety), restrictions and constraints, e.g., facility, organization, government measurement procedures
- public relations and marketing plan

### ABILITY (KNOW HOW TO)

- establish exhibit rates
- identify potential exhibitors considering: compatibility with meeting or event
- produce exhibitor benefit packages (prospectus) containing: overview and history of meeting or event, value for participation, letter of solicitation, audience demographics, ROI measures and opportunities, pre- and post-event/meeting activity restrictions distribute benefit packages to potential exhibitors
- complete the contract negotiations with exhibitors
- ensure positive relations with exhibitors (e.g., recognition program, feedback from exhibitors)

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## SUB SKILL 7.05 - MANAGE MISCELLANEOUS FUNDING SOURCES

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### KNOWLEDGE

- advertising
- merchandise sales
- commissions
- royalties

### ABILITY (KNOW HOW TO)

- develop the options (e.g., fit with organization)

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## Skill 8: Manage Budget

Questions in Skill 8 . . . . .6-8

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Financial goals
- Financial statements and management systems

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## SUB SKILL 8.01 - DEVELOP BUDGET

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### KNOWLEDGE

- scope of meeting or event
- meeting or event objectives
- type of insurance
- basic accounting principles
- required budget format
- organization's cash flow
- fluctuations in currency

### ABILITY (KNOW HOW TO)

- define budget format and categories
- identify, access and interpret data and data sources needed for budget preparation, e.g., previous budgets, audits
- analyze internal and external factors for potential impacts on budget, e.g., new legislation, market trends
- determine potential sources of revenue, for example: grants, sponsorships, sales, e.g., ticket sales, souvenirs; registration; advertising; exhibitor fees

—continued

- allocate budget amounts for meeting or event activities, (direct/indirect costs) for example: programming, production, marketing, administration, human resources, e.g., volunteers, staff, transportation, food and beverage, accommodations, shipping costs, insurance, taxes, gratuities
- establish contingency plan and funds
- use existent chart of accounts: break down into weekly or monthly budgets, detail projected cash flow
- specify fixed and variable costs
- comply with budget control guidelines, e.g., payment policies and procedures, cost controls, deposit policies and procedures for cash, credit cards and payments
- schedule regular budget reviews
- submit budget for approval, if necessary, e.g., to senior management, partners or organization, including: revise budget as required
- communicate budget decisions to those affected

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## SUB SKILL 8.02 – ESTABLISH PRICING (FOR SPONSORS, EXHIBITORS, ATTENDEES)

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### KNOWLEDGE

- profit requirements and desired profit margin
- cost of sales
- customer profiles
- annual consumer price index trends
- currency and credit card procedures for multi-national meetings or events
- credit card handling costs
- currency fluctuations
- pricing information of similar meetings or events (past and present)
- tax structures in host location
- perceived market value of products and services

### ABILITY (KNOW HOW TO)

- collect and analyze information related to current market conditions
- calculate direct and indirect costs
- establish pricing structure, e.g., percentage increase or cost plus, member discount rate

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## SUB SKILL 8.03 – MONITOR BUDGET PERFORMANCE

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### KNOWLEDGE

- budget control guidelines
- importance of budget control
- reporting mechanisms and audit procedures
- performance indicators

### ABILITY (KNOW HOW TO)

- adhere to budget control guidelines and respond to variances
- monitor revenues and expenses within established time frames:
- compare budgeted amounts to actual amounts

—continued

- identify variances between budgeted and actual figures, for example: determine cause(s), identify impacts, respond accordingly, e.g., revise activities, reallocate funds, communicate information and decisions to those affected
- define opportunities for improved budget performance: proactively source new suppliers and revenue streams, discuss desired budgetary outcomes with colleagues, present recommendations to appropriate individuals or departments
- obtain approval for amended budget, where required
- pursue ideas for increasing income or reducing expenditures
- communicate budget performance to key personnel
- complete financial reports and deliver to stakeholders

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### SUB SKILL 8.04 - REVISE BUDGET

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#### KNOWLEDGE

- budget development/revision guidelines
- communication requirements

#### ABILITY (KNOW HOW TO)

- revise or propose revisions to budget, e.g., reallocate funds to cover unexpected expenditures or revenues
- seek approval as required
- update plan as required
- communicate with impacted vendor or stakeholder, as needed

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## Skill 9: Manage Monetary Transactions

Questions in Skill 9. . . . . 1-3

#### COMMON KNOWLEDGE

- Financial accounting and internal controls and procedures
- Security measures

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### SUB SKILL 9.01 - ESTABLISH CASH HANDLING PROCEDURES

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#### ABILITY (KNOW HOW TO)

- communicate policies and procedures to staff and volunteers
- take steps to prevent theft
- coordinate money handling, for example: set up central cash office, establish record-keeping systems, e.g., receipts, set up cash collection and deposit systems, arrange for security and audit systems

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## SUB SKILL 9.02 - MONITOR CASH HANDLING PROCEDURES

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### ABILITY (KNOW HOW TO)

- review security procedures
- monitor revenues and expenses
- monitor cash handling procedures
- monitor audit documentation
- revise procedures as needed

## Skill 10: Acquire Staff and Volunteers

Exam Questions in Domain E . . . . . 5  
Questions in Skill 10 . . . . . 0-2

### COMMON KNOWLEDGE

- Job descriptions
- Applicable legislation, e.g., labor
- Organizational structure
- Organizational policies and procedures
- Meeting or event plans, e.g., critical path

### SUB SKILL 10.01 - DEVELOP SELECTION CRITERIA

#### KNOWLEDGE

- local employment conditions
- local labor laws
- skill sets required for specific positions
- local terms and conditions applied to volunteers, where applicable

#### ABILITY (KNOW HOW TO)

- seek input from current staff about duties and responsibilities
- review documentation as required, for example: organizational chart
- document job requirements, for example: job title, summary of duties, required qualifications and skill sets, level of responsibility, authority and accountability, wages and/or benefits, days/hours of work or time commitment required, grooming and dress codes, option for job to be conducted outside of office, i.e., 'virtually'

### SUB SKILL 10.02 - RECRUIT STAFF AND VOLUNTEERS

#### KNOWLEDGE

- recruiting methods
- costs associated with recruitment
- budget restrictions
- sources for volunteers
- security checks

#### ABILITY (KNOW HOW TO)

- determine best methods for recruiting target group, for example: promote opportunities through local media, promote within organization, seek referrals through networking, participate in work education programs, review applications, contact or hire employment agency
- ensure process is fair, consistent, and effective
- ensure recruitment information is clear and accurate

### SUB SKILL 10.03 - SELECT BEST CANDIDATES AND OFFER POSITIONS

#### KNOWLEDGE

- evaluation criteria

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## Skill 11: Train Staff and Volunteers

Questions in Skill 11 . . . . . 2-4

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event features and details
- Job descriptions
- Applicable legislation, e.g., labor
- Labor agreements, if applicable
- Organizational structure
- Organizational policies and procedures
- Communication protocols and reporting structures
- Current Knowledge, understanding and skills of staff
- Meeting or event plans, e.g., critical path

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### SUB SKILL 11.01 - PROVIDE ORIENTATION

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#### KNOWLEDGE

- orientation and training procedures
- company expectations and guidelines

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### SUB SKILL 11.02 - PROVIDE TRAINING

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#### KNOWLEDGE

- training program development and delivery methods
- subject matter to be taught
- learning styles and teaching methods
- roles of staff, including limits of responsibilities and their personal work objectives

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## Skill 12: Manage Workforce Relations

Questions in Skill 12 . . . . . 0-2

### COMMON KNOWLEDGE

- Job descriptions
- Applicable labor legislation
- Labor agreements, if applicable
- Organizational structure, policies and procedures
- Performance expectations

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### SUB SKILL 12.01 - SUPERVISE STAFF AND VOLUNTEERS

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#### KNOWLEDGE

- good practices, e.g., importance of feedback, conflict resolution
- mentoring and coaching
- methods of recognizing employees and volunteers

#### ABILITY (KNOW HOW TO)

- model high standards of performance and behavior, e.g., promote acceptance of workplace diversity
- communicate expectations, roles and responsibilities of team members and leaders
- promote teamwork
- encourage effective communication
- resolve conflicts
- coach and mentor staff
- delegate tasks and responsibilities
- monitor individual and team performance towards goal(s)
- provide regular feedback on job performance
- identify training needs and set priorities with staff
- address performance problems
- motivate staff and volunteers
- evaluate staff

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### SUB SKILL 12.02 - MANAGE TEAMS

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#### KNOWLEDGE

- purpose of team
- required mix of expertise, knowledge and skills to achieve team purpose
- leadership styles
- team dynamics and stages of growth

# DOMAIN F. STAKEHOLDER MANAGEMENT

8%  
OF EXAM

## Skill 13: Manage Stakeholder Relationships

COMMON KNOWLEDGE (None)

Exam Questions in Domain F . . . . .12  
Questions in Skill 13 . . . . .12

### SUB SKILL 13.01 – IDENTIFY, ASSESS, AND CATEGORIZE STAKEHOLDERS

#### KNOWLEDGE

- mission statement, goals and objectives of meeting or event and organization
- meeting or event details, e.g., features, critical path
- appropriate protocols and local customs, e.g., dress code, VIP treatment

#### ABILITY (KNOW HOW TO)

- identify internal and external stakeholders, e.g., clients, officials, sponsors, participants, providers, exhibitors
- define stakeholder interest, issues and priorities
- determine opportunities and challenges that each stakeholder presents

### SUB SKILL 13.02 – MANAGE STAKEHOLDER ACTIVITIES

#### KNOWLEDGE

- applicable legislation, e.g., liquor laws, professional codes
- appropriate protocols and local customs, e.g., dress code, VIP treatment

#### ABILITY (KNOW HOW TO)

- recognize and integrate varied interests and goals of stakeholders
- determine activities that meet the needs of stakeholders
- acknowledge and monitor stakeholder concerns and capabilities
- follow appropriate protocols when communicating with stakeholders
- communicate appropriate protocols to stakeholders
- sequence and synchronize activities
- develop schedules of activities
- liaise with all stakeholders

### SUB SKILL 13.03 – MANAGE STAKEHOLDER RELATIONSHIPS

#### KNOWLEDGE

- codes of practice and ethics including customer and consumer rights
- legal and regulatory requirements
- meeting or event products and services
- meeting or event stakeholders
- stakeholder satisfaction survey methods

#### ABILITY (KNOW HOW TO)

- ensure staff understand expectations of stakeholders
- make sure staff understand their own roles and responsibilities for meeting stakeholder expectations
- empower staff and volunteers to deliver good stakeholder service
- confirm that clear and effective conflict resolution processes are in place

—continued

- strengths and weaknesses of products and services
- competitors' activities, products and services

- investigate and resolve reoccurring problems
- communicate acceptable day-to-day behavior that matches organization's values
- recognize contribution of 'front line' staff who work with stakeholders
- establish system to evaluate/monitor stakeholder satisfaction
- make recommendations to improve service

# DOMAIN G. MEETING OR EVENT DESIGN

16%  
OF EXAM

## Skill 14: Develop Program (content and activities of event)

Exam Questions in Domain G . . . . . 24  
Questions in Skill 14 . . . . . 5-7

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Creative concept and theme of meeting or event
- Target market(s)
- Previous entertainment/performance programs
- Budgetary restrictions, constraints and financial targets
- Meeting or event plans, e.g., critical path

### SUB SKILL 14.01 - DETERMINE PROGRAM COMPONENTS

#### KNOWLEDGE

- potential program components, e.g., activities, food and beverages, décor and design, educational sessions
- structure and sequence of program components
- sources of human, physical and financial resources
- meeting or event objectives
- attendee profile
- previous program evaluation results/report
- legal and regulatory requirements

#### ABILITY (KNOW HOW TO)

- analyze previous year's(s') program and evaluation report, if applicable
- consider meeting or event objectives, and education and learning principles
- research new ideas, for example: review programs of other similar meeting or events, survey target market(s), determine attendee expectations, e.g., conduct brainstorming and other idea-generating exercises, identify opportunities for innovation
- identify desired program components, e.g., speakers, entertainment, attractions, activities, ancillary programs
- ensure desired components meet legal and regulatory requirements
- obtain cost estimates and discuss details with colleagues, as applicable
- gain stakeholder support for program components

### SUB SKILL 14.02 - SELECT PROGRAM CONTENT AND DELIVERY FORMATSS

#### KNOWLEDGE

- education and learning principles
- theme of meeting or event
- desired program component
- projected attendance
- legal requirements
- marketing activities
- participation patterns

#### ABILITY (KNOW HOW TO)

- research options, e.g., send out requests for proposals/bids, contact agents and speakers' bureaus, identify key personnel
- communicate meeting or event needs with speakers and entertainers
- match program format and outcomes to stakeholder objectives
- select options that meet needs and constraints, e.g., legal, site, budget, educational goals

—continued

- consider compatibility to meeting or event objectives, other program components and marketing strategies
- secure program components: approve conditions/expectations/deliverables, agree on provision of program component requirements, e.g., technical needs
- determine requirements for each program component, e.g., production times
- present program content and delivery formats to stakeholders for input and approval, as necessary
- allocate required resources

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### SUB SKILL 14.03 - STRUCTURE AND SEQUENCE PROGRAM COMPONENTS

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#### KNOWLEDGE

- program components' requirements
- contract requirements
- time frame
- meeting or event critical path
- site design
- marketing activities
- program sequencing tools, e.g., flow charts, Gantt charts, meeting minutes
- communication plan
- exhibit hours

#### ABILITY (KNOW HOW TO)

- determine location and duration requirements for each program component
- consider pace, set-up requirements
- identify contiguous and concurrent program components
- accommodate protocols for ceremonial/religious/political components
- include marketing activity requirements, e.g., contest winners, competitions, announcements
- compile program agenda
- assign roles to personnel appropriate to their responsibilities and skills
- allocate resources
- develop contingency plan for program components
- create required documents, including: script, if required, detailed agenda, production schedule

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### SUB SKILL 14.04 - MEASURE EVENT SUCCESS

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#### KNOWLEDGE

- Return on Investment (ROI), Return on Objective (ROO)
- levels of evaluation

#### ABILITY (KNOW HOW TO)

- compare event with objectives
- develop benchmarks
- create tools for measuring success, e.g., surveys

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## Skill 15: Engage Speakers and Performers

Questions in Skill 15 . . . . . 1-3

### COMMON KNOWLEDGE

- Applicable legislation, e.g., labor, copyright/intellectual property rights
- Meeting goals and objectives
- Adult learning principles
- Organizational structure, policies and procedures
- Meeting or event plans, e.g., critical path
- Budget

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### SUB SKILL 15.01 - DETERMINE MEETING OR EVENT REQUIREMENTS FOR SPEAKERS AND PERFORMERS

#### KNOWLEDGE

- times, locations or activities that require speakers and performers
- requirements for performers
- types of speakers and performers, e.g., musicians, presenters

#### ABILITY (KNOW HOW TO)

- determine types of speakers or performers to meet goals and objectives of meeting or event
- source speakers and performers, e.g., use speaker bureaus, agents, directories

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### SUB SKILL 15.02 - DEVELOP SELECTION CRITERIA/STRATEGIES

#### KNOWLEDGE

- audience demographics, political environment, culture
- type of program required
- proposed time, duration and location

#### ABILITY (KNOW HOW TO)

- seek input on selection criteria
- document selection criteria, for example: type of performer or speaker required, duration and location of performance or program, compensation and/or benefits, hours of work or time commitment required
- use selection criteria to choose suitable performers and speakers

---

### SUB SKILL 15.03 - SELECT CANDIDATES

#### KNOWLEDGE

- selection criteria

#### ABILITY (KNOW HOW TO)

- prepare for selection, including: questions and selection criteria, selection committee, supply speaker(s) and performer(s) selection criteria
- review key information, e.g., overview of requirements
- observe candidates' performance, e.g., live selection or recorded
- record comments and ratings based on selection criteria
- select best performer or speaker

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## SUB SKILL 15.04 – SECURE CONTRACTS AND COMMUNICATE EXPECTATIONS

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### KNOWLEDGE

- principles of negotiation
- components of legal contracts
- meeting or event requirements

### ABILITY (KNOW HOW TO)

- negotiate contracts
- monitor to ensure obligations are fulfilled
- communicate regularly with speaker(s) and performer(s), including: expectations of both parties, attendee expectations, goals of meeting, logistics, attendee profile, performance limitations, e.g., dress code, cultural information
- integrate contractual obligations into meeting or event’s critical path
- follow up on issues, for example: agree on action to rectify non-compliance, deal with breaches of contract within acceptable time frame
- evaluate contractors’ performances to identify strengths and weaknesses

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## Skill 16: Coordinate Food and Beverage Services

Questions in Skill 16 . . . . . 4-6

### COMMON KNOWLEDGE

- Meeting or event profile, features, budget and theme
- Target market(s)
- Applicable legislation, e.g., liquor laws, public health, food safety (including food recalls), responsible beverage service
- Meeting or event plans, e.g., critical path
- Political and/or cultural environment

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## SUB SKILL 16.01 – DETERMINE FOOD AND BEVERAGE SERVICE REQUIREMENTS

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### KNOWLEDGE

- operational constraints due to venue, site or climatic conditions
- dietary needs or concerns
- principles and legal requirements of food safety
- attendee profile
- program schedule

### ABILITY (KNOW HOW TO)

- identify considerations, for example: theme, sponsors, licensing requirements, attendee profile, trends
- develop guidelines for, for example: acquiring products and services, e.g., tendering, direct purchase, establishing controls, e.g., quality, security, methods of distribution, e.g., paid or complimentary
- comply with legislation, e.g., liquor, public health
- confirm date, time and location of food and beverage services
- perform quantity calculations
- determine supplies and equipment required, e.g., dishes, cutlery, glasses, tables, table linens, ice, tickets

—continued

- arrange for: equipment to be set up and operational, supplies to be delivered and available, delivery, storage, returns and recycling of bottles, security for cash, alcohol and tickets, staff training in responsible beverage service
- schedule staff, for example: determine number of staff required, identify tasks to be completed post schedule

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## SUB SKILL 16.02 - SELECT MENU(S)

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### KNOWLEDGE

- attendee profile
- current food and beverage trends
- event history, e.g., past selections
- venue, location

### ABILITY (KNOW HOW TO)

- determine requirements for meal services, for example: menu, arrangements to meet dietary needs or concerns, number of people, cancellation policy, margin for adjustment, e.g., 10%, minimum guarantee
- identify requirements for refreshment and beverage services, for example: supplies, e.g., alcohol, mixes, condiments, glassware, ice, type of bar service, e.g., cash or host
- address storage, e.g., refrigeration, space requirements
- set menus, including: consult with key stakeholders or sponsor, incorporate nutritional requirements, accommodate dietary restrictions, address cost considerations
- ensure that serving staff are knowledgeable about menu and ingredients

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## SUB SKILL 16.03 - PLAN SERVICE STYLE(S)

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### KNOWLEDGE

- types of service styles
- principles and practices of food safety
- program schedule
- attendee profile

### ABILITY (KNOW HOW TO)

- determine appropriate service style(s) for meeting or event, e.g., table service, cocktail service, buffet, concessions
- identify possible room set-ups, including: check layout and amenities, e.g., electrical, water, service and storage areas
- select service style(s) for meeting or event
- develop service style plan, for example: timing, staffing, equipment
- confirm arrangements with suppliers

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## SUB SKILL 16.04 - SELECT FOOD AND BEVERAGE PROVIDER(S)

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### KNOWLEDGE

- qualified food and beverage providers
- on-site and off-site food and beverage capabilities
- exclusive and approved contractors

### ABILITY (KNOW HOW TO)

- conduct research for best value/price
- source food and beverage suppliers
- select food and beverage provider(s)
- sign and date service contracts
- maintain communication as meeting or event approaches

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## SUB SKILL 16.05 - MANAGE ALCOHOL SERVICE

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### KNOWLEDGE

- training programs
- applicable legislation, e.g., legal drinking age

### ABILITY (KNOW HOW TO)

- address liabilities and insurance requirements
- identify type of alcohol service, e.g., cash bar, host bar
- ensure that staff are trained in responsible beverage service
- monitor alcohol service
- comply with applicable legislation

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## Skill 17: Design Environment

Questions in Skill 17 . . . . . 3-5

### COMMON KNOWLEDGE

- Meeting or event theme and branding
- Target market(s)
- Meeting or event plans, e.g., critical path
- Applicable legislation, e.g., special effects, capacity
- Budget
- Local cultural sensitivities
- Venue rules and regulations

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## SUB SKILL 17.01 - ESTABLISH FUNCTIONAL REQUIREMENTS

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### KNOWLEDGE

- design concepts of meetings or events, e.g., learning formats, ergonomics
- current trends
- requirements for attendees with special needs

### ABILITY (KNOW HOW TO)

- enhance attractiveness and functionality of meeting or event
- incorporate movement, methodology and message into design concept
- design an environment that: enhances performance, encourages desired behavior and learning, fulfills stakeholder contract obligations, e.g., meets organization's brand requirements

—continued

- integrate theme, branding and ambience into meeting or event environment
- determine needs, e.g., registration area, meeting rooms, exposition, storage
- comply with legislation, e.g., balloon releases, fireworks, lasers, capacity

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## SUB SKILL 17.02 – SELECT DÉCOR AND FURNISHINGS

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### KNOWLEDGE

- importance of décor elements for functional and experiential contexts
- props, scenery, decorations
- design trends
- theme, budget and objectives of meeting or event

### ABILITY (KNOW HOW TO)

- review theme, budget and objectives of meeting or event
- identify assets and limitations of site
- determine desired atmosphere for meeting or event
- design elements of décor plan, for example: include meeting or event theme and images, incorporate signage obligations, e.g., as defined in contract requirements, incorporate audiovisual or technical elements as appropriate, comply with legislation, e.g., fire-retardant materials
- submit draft plan for approval as necessary, e.g., board of directors, clients, fire marshal
- communicate plan to appropriate parties, e.g., site manager, meeting or event coordinator
- source décor and furnishing suppliers
- secure selected décor and furnishings

---

## SUB SKILL 17.03 – COORDINATE MEETING OR EVENT SIGNAGE

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### KNOWLEDGE

- importance of effective signage
- types of signage, e.g., digital, human, printed, sustainable
- people and vehicular traffic patterns and traffic flow design
- signage restrictions

### ABILITY (KNOW HOW TO)

- identify signage requirements for meeting or event, e.g., language
- develop signage that provides information and identification
- select signage that enhances desired and/or required traffic flow
- source and select appropriate suppliers
- coordinate installation and placement of signage at meeting or event

## Skill 18: Manage Technical Production

Questions in Skill 18 . . . . . 2-4

### COMMON KNOWLEDGE

- Product and service terminology, features and options and current technology and trends in key areas of staging, e.g., lighting
- Applicable legislation, e.g., permits, occupational health and safety
- Risk management, e.g., safety considerations
- Problem solving and decision making
- Meeting or event plans, e.g., critical path
- Meeting goals and objectives
- Labor agreements
- Communication order of command
- Exclusives
- Budget

### SUB SKILL 18.01 - DETERMINE REQUIREMENTS FOR STAGING AND TECHNICAL EQUIPMENT

#### KNOWLEDGE

- installation and operation of production elements
- physical constraints of site
- program objectives
- audio-visual fundamentals
- special needs of attendees and speakers

#### ABILITY (KNOW HOW TO)

- review program elements
- determine staging needs, e.g., size, height, surface, capacity
- identify equipment needs, e.g., lighting, sound, audiovisual, infrastructure, safety equipment, special effects
- secure permits or approvals for staging and equipment
- specify spatial needs, temporal and infrastructure requirements and restrictions

### SUB SKILL 18.02 - ACQUIRE STAGING AND TECHNICAL EQUIPMENT

#### KNOWLEDGE

- meeting or event staging and technical equipment specifications
- qualified suppliers and contractors

#### ABILITY (KNOW HOW TO)

- coordinate specifications, for example: detail precise requirements for staging and equipment to be acquired, use proper product and service terminology
- source suppliers and contractors, for example: obtain quotes as necessary, negotiate and obtain staging and equipment

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## SUB SKILL 18.03 - INSTALL STAGING AND TECHNICAL EQUIPMENT

---

### KNOWLEDGE

- installation of staging and equipment
- mechanics of production installation
- skilled personnel for installation
- hiring process for installation specialists
- contingency plans

### ABILITY (KNOW HOW TO)

- coordinate logistics of installing staging and equipment within meeting or event site, e.g., timing of arrival and delivery, placement
- address safety issues or concerns, e.g., electrical cords, railings
- ensure availability of installation equipment, machinery, tools and other assistive devices
- hire skilled installation professionals as required, e.g., stagehands, riggers, electricians
- monitor installation to identify necessary adjustments
- tour stage area with appropriate person (e.g., technician, stage manager) to ensure that requirements have been met for: stage, lighting and audiovisual, special effects, stage security and safety, storage areas
- make arrangements to address concerns

---

## SUB SKILL 18.04 - OVERSEE TECHNICAL PRODUCTION OPERATION

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### KNOWLEDGE

- stage management, including typical problems and resolutions
- team leading and delegating
- safety and integrity of staging and equipment, e.g., power, floor loads, staging loads
- location from which technicians will operate, e.g., booth, table, area, trailer

### ABILITY (KNOW HOW TO)

- liaise with technical director and equipment operators as needed
- communicate roles, responsibilities, restrictions and timelines with technical personnel
- provide sufficient time and access for performer and technical rehearsals and equipment checks, for example: evaluate all elements of program, e.g., program content, entertainers, sound, special effects, adjust timing and sequencing if necessary
- monitor technical issues during meeting or event
- manage disruption to performance or program, where necessary

---

## Skill 19: Develop Plan for Managing Movement of Attendees

### COMMON KNOWLEDGE

- Meeting or event profile, features and budget
- Applicable legislation
- Meeting or event plans, e.g., critical path
- Attendee/participant needs
- Local infrastructure, local situation (e.g., special event in the area)
- Venue restrictions

Questions in Skill 19 . . . . .3-5

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## SUB SKILL 19.01 – DEVELOP ADMITTANCE CREDENTIAL SYSTEMS

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### KNOWLEDGE

- admission and access control methods
- registration methods, e.g., ticketing systems
- admission support systems, e.g., crowd control, ushers, signage

### ABILITY (KNOW HOW TO)

- analyze needs and requirements, e.g., capacity, criteria of access, restrictions
- select admittance systems to be used, e.g., registration procedures, tickets, name tags, photo identification, wristbands
- select technology to support admission systems
- consult with specialists (e.g., local police, security company) as required
- draft plan for admittance, including: criteria, levels/categories, e.g., general admission, VIPs, methods, security, requirements for other on-site admission, communication policy, special needs of attendees

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## SUB SKILL 19.02 – SELECT CROWD MANAGEMENT TECHNIQUES

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### KNOWLEDGE

- communication plan
- access control methods
- local regulations
- traffic flow, circulation and congregation management
- queue management
- sources of specialist assistance in relation to crowd control, e.g., security companies, police
- technology and equipment used in crowd management
- specific risk management issues associated with crowds

### ABILITY (KNOW HOW TO)

- develop crowd management strategies for: traffic flow, e.g., circulation, congregation, conditions exceeding thresholds, e.g., regulatory capacity levels, attendee behavior and restrictions
- determine appropriate entry and exit locations, considering: admittance credentials, seating systems, safety, traffic flow
- establish queue management if necessary
- ensure that space, facilities and services are adequate for attendees
- verify that appropriate signage is used
- communicate policies and expectations regarding attendee behavior and restrictions
- use systems and personnel to manage and monitor crowd conditions and behavior, for example: have systems in place to respond to situations that exceed pre-established thresholds
- obtain services and equipment, for example: ushers, security, signs, barricades
- secure approval of authorities, e.g., fire marshals
- make sure specific risk management issues associated with crowds are in place

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## SUB SKILL 19.03 - COORDINATE ACCOMMODATIONS

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### KNOWLEDGE

- types of accommodations
- reservation procedures and policies
- cancellation policies
- deposit requirements
- payment procedures
- room blocks and rates
- corporate travel policies

### ABILITY (KNOW HOW TO)

- coordinate accommodations, for example: inform participants of reservation process and responsibility, e.g., housing bureau, self-booking

---

## SUB SKILL 19.04 - COORDINATE TRANSPORTATION

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### KNOWLEDGE

- types of transportation available
- reservation procedures and policies
- cancellation policies
- deposit requirements
- payment procedures
- corporate travel policies

### ABILITY (KNOW HOW TO)

- organize transportation, for example: analyze needs and options, e.g., airlines, taxis, charter buses, negotiate and contract suppliers, inform participants of reservation process and responsibility, e.g., deadlines, rates, self-booking, stage vehicles

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## SUB SKILL 19.05 - MANAGE PROTOCOL REQUIREMENTS

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### KNOWLEDGE

- precedence
- titles
- styles of address
- honor and salutes
- flags
- religious, cultural and ritual requirements
- meeting or event logistics
- regulatory issues, e.g., immigration, traffic laws

### ABILITY (KNOW HOW TO)

- determine protocol requirements for: invitations, reception room, seating arrangements, introductions, transportation, accommodations, security
- secure appropriate personnel, e.g., to conduct ceremonies, to accompany VIPs
- arrange for ceremonial equipment, e.g., flags
- coordinate logistical requirements, e.g., to arrange food and beverage or transportation needs of VIPs

## Skill 20: Select Site

Exam Questions in Domain H . . . . .18  
Questions in Skill 20 . . . . .5-7

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features and budget
- Meeting or event plans, e.g., critical path

### SUB SKILL 20.01 - DETERMINE SITE SPECIFICATIONS

#### KNOWLEDGE

- target market(s)
- type of venues
- accessibility needs of special populations, e.g., VIPs, individuals operating motorized vehicles
- purpose of event or meeting

#### ABILITY (KNOW HOW TO)

- review nature, scope, complexity and fiscal requirements of meeting or event, e.g., budget, profile and image, facilities licensing, season, anticipated attendance, flexibility, accessibility (including for those with disabilities), security needs
- determine desired or required geographic location and type of facility for meeting or event
- define spatial needs, proximity, and housing patterns and accessibility requirements for site
- identify dates and durations of site occupancy
- develop site selection criteria

### SUB SKILL 20.02 - IDENTIFY AND INSPECT SITES

#### KNOWLEDGE

- selection criteria
- site infrastructure
- risk management factors

#### ABILITY (KNOW HOW TO)

- research potential sites, e.g., review sites of similar types and scopes of meeting or events; research competing events
- conduct site inspection, for example: investigate and evaluate site, e.g., use site checklist, verify viability of facilities and services, determine availability of services
- prioritize selection criteria
- evaluate possible sites, for example: evaluate location based on proximity to hotels, availability of parking in area, and accessibility, e.g., public transportation, air lift, rate sites based on dates, rates, space, guest rooms and other capabilities or constraints
- determine best site and communicate information to colleagues and key stakeholders to secure approval
- reserve and confirm site, e.g., negotiate and contract facility, outline responsibilities
- maintain and develop effective working relationship with venue personnel

## Skill 21: Design Site Layout

Questions in Skill 21 . . . . . 3-5

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features and budget
- Meeting or event plans, e.g., critical path

### SUB SKILL 21.01 - DESIGN SITE LAYOUT

#### KNOWLEDGE

- adult learning principles
- meeting or event profile, features, budget and program
- meeting or event concept and theme
- site infrastructure and capacity
- budgetary implications
- applicable legislation, e.g., access, fire codes
- site design and site planning, e.g., access points, location of emergency exits

#### ABILITY (KNOW HOW TO)

- determine needs, for example: space, structures—fixed and temporary, adult learning needs, utilities; e.g., power, water, sewage, gas; parking, communications, areas for first aid and lost children, emergency access, legal requirements; e.g., fire regulations; signage, translation or interpretation needs
- confirm location of structures and facilities within site
- draft site plan, recognizing: structures—existing permanent and temporary, facilities, services, exhibit space, meeting or event program, attractions, human and vehicular traffic flow, environmental implications, best use of resources, security, meeting service areas (e.g., registration, bookstore)
- establish space assignments and set-up configurations: obtain expert advice on configuration when needed, build in flexibility to allow for adjustments, detail placement and configuration, e.g., orientation of temporary structure openings
- inspect site and review site plan, for example: accessibility, washrooms, obstructions, capacity limits, loading dock or loading entrance, special needs parking, vehicle road access, utilities
- prepare accurate scale diagrams as required
- inform organization/stakeholders/clients when changes are necessary, e.g., when a planned temporary structure cannot be installed
- adjust site plan as required
- obtain support of key stakeholders for planned layout

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## Skill 22: Manage Meeting or Event Site

Questions in Skill 22 . . . . . 4-6

### COMMON KNOWLEDGE

- Meeting or event profile, features (e.g., exhibits, session, special events, meals) and budget
- Applicable legislation, e.g., occupancy, fire codes, occupational health and safety
- Roles and responsibilities of individuals
- Problem solving and decision making
- Team leading and delegating
- Health, safety and security considerations
- Meeting or event plans, e.g., critical path

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### SUB SKILL 22.01 - CREATE LOGISTICS ACTION PLAN FOR SITE SET-UP AND TAKE-DOWN

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#### KNOWLEDGE

- timing and sequencing
- human resources
- existing physical resources

#### ABILITY (KNOW HOW TO)

- confirm access to site, e.g., specific date(s) and time(s)
- prepare detailed production schedule, including: floor plans, timing, room set-ups, personnel required, roles and responsibilities, exhibit set up, security (e.g., badge checkers, personnel)
- make arrangements for shipping/receiving and storage
- ensure that human resources are available for set-up and take-down
- define and implement site move-in and move-out requirements and restoration including key contact points
- communicate plan to appropriate individuals
- integrate plan with other aspects of meeting or event

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### SUB SKILL 22.02 - SET UP SITE

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#### KNOWLEDGE

- site set-up and take-down action plan
- contractual obligations with suppliers
- delivery schedules
- health, safety, security and environmental consideration

#### ABILITY (KNOW HOW TO)

- confirm access to site
- communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers
- ensure personnel are familiar with equipment being used
- follow up to ensure progress according to production schedule, for example: arrival of services, deliveries and equipment, arrival of related groups, technical rehearsal time and performer/participant orientation, special facilities, e.g., dressing rooms, guest rooms/lounges, equipment rooms, staff office
- ensure equipment is checked and operational
- coordinate inbound receiving

—continued

- determine inbound inventory
- liaise with facility management and site-specific personnel as appropriate
- coordinate with appropriate colleagues and outside service people, e.g., refer issues outside area of responsibility to appropriate personnel
- adapt plan to changing circumstances as necessary: brief all personnel involved

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### SUB SKILL 22.03 - MONITOR SITE DURING MEETING OR EVENT

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#### KNOWLEDGE

- typical systems, procedures and logistics for on-site management
- contractual obligations
- risk management
- contingency plans

#### ABILITY (KNOW HOW TO)

- monitor meeting or event operation through observation and appropriate communication and control mechanisms
- identify and analyze operational problems or need for additional services as issues arise
- implement solutions to problems immediately
- liaise with appropriate parties (e.g., clients) throughout meeting or event to ensure it is progressing to their satisfaction
- monitor and ensure effective delivery of services through ongoing liaison with contractors
- monitor and manage room block (e.g., VIPs, amenities, attrition, overbooking, dishonored reservations, etc.)

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### SUB SKILL 22.04 - DISMANTLE SITE

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#### KNOWLEDGE

- site set-up and dismantling action plans
- contractual obligations
- environmental considerations
- health, safety, security and environmental considerations
- time allotted for dismantle

#### ABILITY (KNOW HOW TO)

- communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers
- coordinate withdrawal of services and equipment, e.g., arrange for utilities to be disconnected
- allow enough time for take-down
- coordinate human resources
- arrange for specialized equipment if required
- clean, count, and pack equipment, for example: check for missing and/or damaged items, return rented equipment, repair and store equipment
- liaise with appropriate colleagues and outside service people
- return site to condition specified in contract/agreement, for example: ensure equipment is checked and operational, confirm suppliers have removed their items from site, remove hazards caused by installation of temporary structures, remove waste and decorations: consider recycling options

- conduct site inspection with facility representative to ensure that site clean-up is satisfactory
- debrief personnel and identify relevant points for meeting or event evaluation
- complete all relevant documents and records according to organization's procedures
- establish outbound inventory counts, e.g., supplies, computers
- coordinate shipping

## Skill 23: Manage On-site Communications

Questions in Skill 23. . . . . 2-4

### COMMON KNOWLEDGE

- Communication technology and terminology
- Meeting or event plans, e.g., critical path
- Local infrastructure

### SUB SKILL 23.01 - ESTABLISH COMMUNICATIONS FRAMEWORK

#### KNOWLEDGE

- importance of communications framework
- effective communication skills
- communication protocols

#### ABILITY (KNOW HOW TO)

- define communication needs of meeting or event, e.g., individuals, meeting or event features
- identify types of messages to be communicated to internal and external public and personnel, e.g., announcements, updates, results, changes: outline content and style of messages to be communicated including terminology and language
- create a flowchart of communication responsibilities that: outlines distribution structure, identifies decision-making hierarchy
- develop communication resources, for example: verification documentation, e.g., specifications guidebook, production book; contact lists, e.g., attendees, staff, suppliers, emergency services
- set up communication channels that facilitate flow and scope of communication needs

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## SUB SKILL 23.02 – DETERMINE AND ACQUIRE REQUIRED COMMUNICATION EQUIPMENT AND RESOURCES

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### KNOWLEDGE

- communication equipment and resources
- budget

### ABILITY (KNOW HOW TO)

- analyze needs, considering: type and size of venue, users, e.g., staff and volunteers, emergency personnel
- analyze local infrastructure
- develop guidelines for: issuing and maintaining equipment, users, e.g., frequencies, usage
- determine technology appropriate for communication needs
- obtain equipment and services, for example: cellular telephones (mobile device), two-way radios, pagers, PA system, web-based, tablets
- integrate technology from all parts of meeting or event into communication plan, e.g., technical production, signage

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## SUB SKILL 23.03 – SPECIFY COMMUNICATION PROCEDURES AND PROTOCOLS

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### KNOWLEDGE

- communication equipment protocols

### ABILITY (KNOW HOW TO)

- specify techniques for internal and external communications, e.g., written, audio, visual and electronic
- identify types of messages to be communicated
- coordinate briefing and debriefing meetings
- establish communication protocols, e.g., radio discipline
- create a plan and team for crisis or emergency situations, e.g., equipment failure
- ensure that on-site communication is available in a timely manner
- train staff in: use of equipment, locations of services, protocol, e.g., what is appropriate to relay by radio
- monitor communication systems on-site: distribute and retrieve equipment, ensure that protocol is followed

## Skill 24: Manage Marketing Plan

Exam Questions in Domain I. . . . . 16  
Questions in Skill 24. . . . . 4-6

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features and budget
- Target market(s)
- Meeting or event plans, e.g., critical path

### SUB SKILL 24.01 - CONDUCT SITUATIONAL ANALYSIS

#### KNOWLEDGE

- sources of market information—current and historical
- data collection and analyzing techniques
- marketing concepts, such as 'marketing mix'
- mission statement, goals and objectives

#### ABILITY (KNOW HOW TO)

- review historical data, e.g., surveys, evaluations, budget
- evaluate meeting or event features, e.g., location, service, merchandise, resources, promotion, price, image
- determine strengths, weaknesses, opportunities and threats to meeting or event and/or organization
- assess target market(s)
- define attendee/participant current and future needs and expectations
- consider competition, e.g., evaluate strengths and weaknesses
- research economic, political and social conditions
- analyze community infrastructure and resources
- consider new marketing techniques and mediums available
- identify opportunities to expand into new markets and innovations to better meet attendee/participant needs
- recognize legal and regulatory restrictions that may impact meeting or event
- summarize results of situational analysis, including: make recommendations and conclusions considering budget and resources

### SUB SKILL 24.02 - DEFINE TARGET MARKET SEGMENTS

#### KNOWLEDGE

- target market analysis, e.g., demographic and psychographic research

#### ABILITY (KNOW HOW TO)

- develop profiles of potential meeting or event attendees/participants/exhibitors/sponsors including, for example: demographics, psychographics
- match target segment profile to features, products and services
- define geographic reach of meeting or event

---

## SUB SKILL 24.03 - SELECT MARKETING DISTRIBUTION CHANNELS

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### KNOWLEDGE

- available marketing distribution channels, e.g., advertising, publicity, direct marketing, cross-promotions/partnerships, Internet (e-commerce, web marketing, online registration)
- strengths and weaknesses of different types of mediums
- meeting or event messages and branding
- how to generate preferences for types of mediums

### ABILITY (KNOW HOW TO)

- analyze available distribution channels(s) for market penetration
- match messages to target market(s) using best approach
- select most effective distribution channels that provide best return on investment

---

## SUB SKILL 24.04 - IMPLEMENT MARKETING PLAN

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### KNOWLEDGE

- available marketing mediums
- strengths and weaknesses of different types of mediums
- target market preferences
- negotiation techniques
- organizational brand guidelines

### ABILITY (KNOW HOW TO)

- communicate goals and objectives of plan—and any changes—to marketing staff
- determine critical dates
- coordinate activities with other aspects of meeting or event production
- monitor activities and results on ongoing basis: ensure that goals and objectives are being met, maintain records of activities, e.g., costs, results, influencing factors
- adjust marketing plan in response to variations in performances, budget, target market behavior and market conditions: re-allocate staff and resources, communicate changes to stakeholders
- prepare evaluation of marketing activities
- design meeting or event marketing strategy that will complement or integrate with organization's marketing strategy
- integrate activities to build on and reinforce each other
- ensure consistency with brand and message with mission statement, goals and objectives

---

## Skill 25: Manage Marketing Materials

Questions in Skill 25. . . . . 2-4

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event budget, e.g. allocations
- Meeting or event plans, e.g., critical path
- Target market segment

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## SUB SKILL 25.01 - DETERMINE NEEDED MARKETING MATERIALS FOR EVENT

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### KNOWLEDGE

- available marketing distribution channels, e.g., print/imprint, electronic, social media sites

### ABILITY (KNOW HOW TO)

- determine marketing collateral needed for marketing and meeting or event activities, e.g., brochures, programs, tickets
- analyze media available to meet requirements, e.g., print, electronic
- identify marketing message for each target market segment
- select suitable and cost-effective medium for each type of meeting or event material to be produced

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## SUB SKILL 25.02 - DEVELOP CONTENT AND DESIGN PARAMETERS

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### KNOWLEDGE

- meeting or event features, theme/concept, branding and message
- meeting or event details, e.g., date, time, location
- materials to be produced

### ABILITY (KNOW HOW TO)

- determine style of marketing collateral, e.g., design, format
- use appropriate language and formats for respective audiences
- incorporate branding message, e.g., logos, slogans, positioning statements
- prepare content of text
- approve/prepare layout for printing and production
- monitor consistency of meeting or event theme/concept, branding and message
- secure permission to use intellectual property as necessary, e.g., seek 'approval for printing' waivers
- obtain permission to use copyrighted and licensed materials, if required

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## SUB SKILL 25.03 - PRODUCE MARKETING MATERIALS

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### KNOWLEDGE

- procurement plan and processes

### ABILITY (KNOW HOW TO)

- define specifications for each item
- source and solicit suitable providers
- determine delivery deadlines
- monitor quality and accuracy of text and match to specifications
- understand potential impact of geographic location of provider, e.g., customs, shipping

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## SUB SKILL 25.04 - DISTRIBUTE MARKETING MATERIALS

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### KNOWLEDGE

- contact distribution lists
- contact personnel for internal and external operations
- promotional activities schedule

### ABILITY (KNOW HOW TO)

- determine delivery method for each item produced, e.g., coordinate delivery logistics
- develop distribution schedule
- organize and assemble materials for distribution
- comply with information management plan for archiving printed/imprinted materials

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## Skill 26: Manage Meeting or Event Merchandise

Questions in Skill 26 . . . . . 0-2

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event plans, e.g., critical path
- Target market segments
- Budget
- Customs regulations

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## SUB SKILL 26.01 - DEVELOP PRODUCT(S) DESIGN AND SPECIFICATIONS

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### KNOWLEDGE

- meeting or event theme/concept, branding and message(s)
- historical data on past merchandise
- brand guidelines

### ABILITY (KNOW HOW TO)

- leverage post-meeting or event merchandising sales opportunities
- review historical data, e.g., types of merchandise, how and where sold, price points
- research customer needs and interests
- assess need to modify or discontinue existing merchandise: identify new or replacement merchandise
- evaluate competition, e.g., other similar products, price points, merchandising venues
- determine potential liabilities and legalities associated with merchandise
- define product design and production specifications
- note new marketing techniques and mediums available
- identify other/new market opportunities
- integrate product concepts with other marketing activities, e.g., advertising poster upgraded to merchandise quality poster

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## **SUB SKILL 26.02 – DETERMINE PRICING**

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### **KNOWLEDGE**

- marketing objectives
- historical data on price points of previous merchandise
- financial goals
- market conditions

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## **SUB SKILL 26.03 – CONTROL BRAND INTEGRITY**

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### **KNOWLEDGE**

- meeting or event brand and messaging
- legal rights
- brand guidelines

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## **SUB SKILL 26.04 – ACQUIRE MERCHANDISE**

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### **KNOWLEDGE**

- procurement plan and process
- budget allocation
- merchandise specifications
- launch dates for merchandise

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## **SUB SKILL 26.05 – DISTRIBUTE MERCHANDISE**

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### **KNOWLEDGE**

- launch dates for merchandise
- procurement plan and process
- point of sale restrictions, e.g., selling products on display floor

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## **Skill 27: Promote Meeting or Event**

Questions in Skill 27 . . . . . 3-5

### **COMMON KNOWLEDGE**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event plans, e.g., critical path
- Target market segments
- Meeting or event concept/theme
- Budget
- Customs and regulations

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## SUB SKILL 27.01 – DEVELOP CROSS-PROMOTIONAL ACTIVITIES

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### KNOWLEDGE

- official meeting or event sponsors, suppliers, donors
- impact of meeting or event on local community, e.g., economic benefits, social responsibilities
- advertising plan, including channels

### ABILITY (KNOW HOW TO)

- assess potential partnership opportunities with sponsors, donors, suppliers and other compatible organizations
- evaluate opportunities and costs to promote meeting or event at venues of other non-competing meetings or events with similar target market segments
- select mix of activities for promotions, e.g., multi-tiered, cross-promotions
- determine resource requirements, e.g., print materials and merchandise
- liaise with partners
- coordinate launch dates of each promotional activity

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## SUB SKILL 27.02 – DEVELOP CONTESTS (E.G., ENCOURAGE REGISTRATION, TRAFFIC BUILDERS, CHAPTER CHALLENGE)

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### KNOWLEDGE

- official meeting or event sponsors, suppliers, donors
- budget allocation
- branding and message of meeting or event
- permits or legal requirements

### ABILITY (KNOW HOW TO)

- determine type of contest(s) to hold
- assess liabilities and legalities
- establish rules, regulations, selection criteria, entry procedures
- define prize system
- seek out cross-promotional opportunities with sponsors and suppliers, e.g., media supplier
- define resource requirements, e.g., print materials
- coordinate presentation logistics

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## SUB SKILL 27.03 – COORDINATE HOSPITALITY

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### KNOWLEDGE

- local meetings or events and attractions
- hospitality protocol
- target market(s)

### ABILITY (KNOW HOW TO)

- determine hospitality requirements
- organize hospitality services and facilities, for example: designate reception areas, book tickets for local meetings or events and attractions, arrange for transportation, arrange food and beverage services, arrange for information on local meetings or events/ attractions
- make arrangements for hospitality services

---

## Skill 28: Contribute to Public Relations Activities

Questions in Skill 28. . . . . 1-3

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event features, concept/theme
- Meeting or event plans, e.g., critical path
- Target market segments
- Stakeholders' needs and expectations
- Communication plan and protocols
- Budget

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### SUB SKILL 28.01 - CONTRIBUTE TO PUBLIC RELATIONS STRATEGY

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#### KNOWLEDGE

- marketing plan and promotional activities
- communication plan
- public relations strategies
- emergency response and risk management plan

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### SUB SKILL 28.02 - CONTRIBUTE TO PUBLICITY PLAN

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#### KNOWLEDGE

- marketing plan and promotional activities
- key internal and external issues affecting meeting or event and/or organization
- organization's key messages

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### SUB SKILL 28.03 - MANAGE MEDIA RELATIONS

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#### KNOWLEDGE

- publicity strategies and plan
- selected media and communication outlets
- media contacts and protocols

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### SUB SKILL 28.04 - CONTRIBUTE TO IMPLEMENTATION OF PUBLICITY PLAN

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#### KNOWLEDGE

- message and brand of meeting or event
- impact of meeting or event on local community, e.g., economic benefits, spin-off benefits

#### ABILITY (KNOW HOW TO)

- identify issues and trends that may impact meeting or event objectives and/or production
- monitor news and stakeholder environments for anything that could affect meeting or event and its production
- adjust plan and activities to address issues and changes to image

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## SUB SKILL 28.05 - MANAGE RESPONSE TO CRISES AND CONTROVERSIES

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### KNOWLEDGE

- selected media and communication outlets
- media contacts and protocols
- emergency response plan
- current and emerging social concerns
- risk management plan

### ABILITY (KNOW HOW TO)

- monitor news related to meeting or event and stakeholder environments
- recognize potential of incidents to escalate
- follow communication protocols
- gather facts to verify or dispute claims
- integrate control of crises and controversies with public relations activities
- maintain consistent, agreed-upon messages in keeping with mission statement, goals and objectives of meeting or event and organization
- document findings
- access legal counsel

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## Skill 29: Manage Meeting-Related Sales Activities

Questions in Skill 29 . . . . . 0-2

### COMMON KNOWLEDGE

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event products, e.g., registration, merchandise, tickets, booth/concession space, accommodations packages
- Target market segments
- Communication plan and protocols
- Site design

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## SUB SKILL 29.01 - CONTRIBUTE TO SALES PLAN AND OBJECTIVES

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### KNOWLEDGE

- target market segmentation analysis and purchasing behavior
- marketing plan
- competitors' sales practices

### ABILITY (KNOW HOW TO)

- identify legal, regulatory and ethical requirements for sales
- specify revenue sources, e.g., registration fees, advertising, products
- set sales objectives for all meeting or event products, for example: review historical data on previous sales figures, identify previous target market segments
- define potential target market segments

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## SUB SKILL 29.02 - CONDUCT SALES ACTIVITIES

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### KNOWLEDGE

- sales plan and objectives, tools and tactics, targets
- principles of selling, sales communication and relationship-building
- procurement plan and process

### ABILITY (KNOW HOW TO)

- integrate sales tactics with promotional and advertising activities to encourage desired consumer behavior
- use sales tools and tactics, e.g., qualify leads, conduct sales calls, deliver sales presentations, package products, provide sales incentives, provide giveaways, use telephone sales, overcome client objections
- close sales, including: negotiate sales details, e.g., cost/price, shipping fees, set dates for product delivery, e.g., booth set-up, merchandise delivery
- check for unauthorized on-site or remote sales activities

## Skill 30: Exhibit Professional Behavior

Exam Questions in Domain J . . . . . 2  
Questions in Skill 30 . . . . . 2

### COMMON KNOWLEDGE

- Organizational policies and procedures
- Organizational structure
- Protocols, (e.g., local political, social, and cultural)
- Local and cultural sensitivities

### COMMON ABILITIES

- Project a professional image
- Demonstrate leadership
- Work with colleagues
- Work in a diverse environment
- Manage time
- Manage stress
- Make decisions
- Solve problems
- Keep up-to-date with changes in meetings and events
- Facilitate continuous improvement
- Participate in professional development activities

## SUB SKILL 30.01 - DEMONSTRATE ETHICAL BEHAVIOR

### KNOWLEDGE

- code of ethics accepted and used by industry sector and country
- importance of acting ethically

### ABILITY (KNOW HOW TO)

- take responsibility for obligations, actions and decisions
- represent capabilities and conditions accurately and without deception
- demonstrate fairness and transparency in all transactions and interactions
- adhere to ethical standards of conduct
- implement and enforce policies and procedures that promote ethical practices and behaviors

# CMP Detailed Exam Content

10 DOMAINS	30 SKILLS	106 SUB SKILLS	NUMBER OF EXAM QUESTIONS
<b>DOMAIN A. STRATEGIC PLANNING</b>			<b>24</b>
<b>Skill 1 Manage Strategic Plan for Meeting or Event</b> Sub Skill 1.01 Develop mission statement, goals and objectives of meeting or event Sub Skill 1.02 Determine feasibility of meeting or event Sub Skill 1.03 Determine requirements to carry out meeting or event Sub Skill 1.04 Develop financial summary Sub Skill 1.05 Monitor strategic plan			<b>6-8</b>
<b>Skill 2 Develop Sustainability Plan for Meeting or Event</b> Sub Skill 2.01 Implement sustainability management plan Sub Skill 2.02 Demonstrate environmental responsibility			<b>9-11</b>
<b>Skill 3 Develop Business Continuity or Long-Term Viability Plan of Meeting or Event</b> Sub Skill 3.01 Develop evaluation plan Sub Skill 3.02 Measure return on investment Sub Skill 3.03 Evaluate/audit meeting or event Sub Skill 3.04 Evaluate effectiveness of risk management plan			<b>6-8</b>
<b>DOMAIN B. PROJECT MANAGEMENT</b>			<b>22</b>
<b>Skill 4 Plan Meeting or Event Project</b> Sub Skill 4.01 Develop project plan Sub Skill 4.02 Develop quality standards, policies and procedures Sub Skill 4.03 Develop theme for meeting or event Sub Skill 4.04 Develop procurement plan (acquisition of goods and services) Sub Skill 4.05 Establish milestones and critical path Sub Skill 4.06 Develop integrated communication plan Sub Skill 4.07 Develop evaluation/audit procedures			<b>11-13</b>
<b>Skill 5 Manage Meeting or Event Project</b> Sub Skill 5.01 Manage critical path Sub Skill 5.02 Manage contracts Sub Skill 5.03 Manage implementation of meeting or event			<b>9-11</b>
<b>DOMAIN C. RISK MANAGEMENT</b>			<b>12</b>
<b>Skill 6 Manage Risk Management Plan</b> Sub Skill 6.01 Identify risks Sub Skill 6.02 Analyze risks Sub Skill 6.03 Develop management and implementation plan Sub Skill 6.04 Develop and implement emergency response plan Sub Skill 6.05 Arrange security			<b>12</b>
<b>DOMAIN D. FINANCIAL MANAGEMENT</b>			<b>15</b>
<b>Skill 7 Manage Event Funding and Financial Resources</b> Sub Skill 7.01 Manage sponsorship and donor process Sub Skill 7.02 Manage grant funding process Sub Skill 7.03 Manage registration process Sub Skill 7.04 Manage exhibit sales process Sub Skill 7.05 Manage miscellaneous funding sources			<b>5-7</b>

<p><b>Skill 8 Manage Budget</b></p> <ul style="list-style-type: none"> <li>Sub Skill 8.01 Develop budget</li> <li>Sub Skill 8.02 Establish pricing (for sponsors, exhibitors, attendees)</li> <li>Sub Skill 8.03 Monitor budget performance</li> <li>Sub Skill 8.04 Revise budget</li> </ul>	<b>6-8</b>
<p><b>Skill 9 Manage Monetary Transactions</b></p> <ul style="list-style-type: none"> <li>Sub Skill 9.01 Establish cash handling procedures</li> <li>Sub Skill 9.02 Monitor cash handling procedures</li> </ul>	<b>1-3</b>
<b>DOMAIN E. HUMAN RESOURCES</b>	<b>5</b>
<p><b>Skill 10 Acquire Staff and Volunteers</b></p> <ul style="list-style-type: none"> <li>Sub Skill 10.01 Develop selection criteria</li> <li>Sub Skill 10.02 Recruit staff and volunteers</li> <li>Sub Skill 10.03 Select best candidates and offer positions</li> </ul>	<b>0-2</b>
<p><b>Skill 11 Train Staff and Volunteers</b></p> <ul style="list-style-type: none"> <li>Sub Skill 11.01 Provide orientation</li> <li>Sub Skill 11.02 Provide training</li> </ul>	<b>2-4</b>
<p><b>Skill 12 Manage Workforce Relations</b></p> <ul style="list-style-type: none"> <li>Sub Skill 12.01 Supervise staff and volunteers</li> <li>Sub Skill 12.02 Manage teams</li> </ul>	<b>0-2</b>
<b>DOMAIN F. STAKEHOLDER MANAGEMENT</b>	<b>12</b>
<p><b>Skill 13 Manage Stakeholder Relationships</b></p> <ul style="list-style-type: none"> <li>Sub Skill 13.01 Identify, assess, and categorize stakeholders</li> <li>Sub Skill 13.02 Manage stakeholder activities</li> <li>Sub Skill 13.03 Manage stakeholder relationships</li> </ul>	<b>12</b>
<b>DOMAIN G. MEETING OR EVENT DESIGN</b>	<b>24</b>
<p><b>Skill 14 Develop Program</b></p> <ul style="list-style-type: none"> <li>Sub Skill 14.01 Determine program components</li> <li>Sub Skill 14.02 Select program content and delivery formats</li> <li>Sub Skill 14.03 Structure and sequence program components</li> <li>Sub Skill 14.04 Measure event success</li> </ul>	<b>5-7</b>
<p><b>Skill 15 Engage Speakers and Performers</b></p> <ul style="list-style-type: none"> <li>Sub Skill 15.01 Determine meeting or event requirements for speakers and performers</li> <li>Sub Skill 15.02 Develop selection criteria/strategies</li> <li>Sub Skill 15.03 Select candidates</li> <li>Sub Skill 15.04 Secure contracts and communicate expectations</li> </ul>	<b>1-3</b>
<p><b>Skill 16 Coordinate Food and Beverage Services</b></p> <ul style="list-style-type: none"> <li>Sub Skill 16.01 Determine food and beverage service requirements</li> <li>Sub Skill 16.02 Select menu(s)</li> <li>Sub Skill 16.03 Plan service style(s)</li> <li>Sub Skill 16.04 Select food and beverage provider(s)</li> <li>Sub Skill 16.05 Manage alcohol service</li> </ul>	<b>4-6</b>

<p><b>Skill 17 Design Environment</b>  Sub Skill 17.01 Establish functional requirements  Sub Skill 17.02 Select décor and furnishings  Sub Skill 17.03 Coordinate meeting or event signage</p>	<b>3-5</b>
<p><b>Skill 18 Manage Technical Production</b>  Sub Skill 18.01 Determine requirements for staging and technical equipment  Sub Skill 18.02 Acquire staging and technical equipment  Sub Skill 18.03 Install staging and technical equipment  Sub Skill 18.04 Oversee technical production operation</p>	<b>2-4</b>
<p><b>Skill 19 Develop Plan for Managing Movement of Attendees</b>  Sub Skill 19.01 Develop admittance credential systems  Sub Skill 19.02 Select crowd management techniques  Sub Skill 19.03 Coordinate accommodations  Sub Skill 19.04 Coordinate transportation  Sub Skill 19.05 Manage protocol requirements</p>	<b>3-5</b>
<b>DOMAIN H. SITE MANAGEMENT</b>	<b>18</b>
<p><b>Skill 20 Select Site</b>  Sub Skill 20.01 Determine site specifications  Sub Skill 20.02 Identify and inspect sites</p>	<b>5-7</b>
<p><b>Skill 21 Design Site Layout</b>  Sub Skill 21.01 Design site layout</p>	<b>3-5</b>
<p><b>Skill 22 Manage Meeting or Event Site</b>  Sub Skill 22.01 Create logistics action plan for site set-up and take-down  Sub Skill 22.02 Set up site  Sub Skill 22.03 Monitor site during meeting or event  Sub Skill 22.04 Dismantle site</p>	<b>4-6</b>
<p><b>Skill 23 Manage On-site Communications</b>  Sub Skill 23.01 Establish communications framework  Sub Skill 23.02 Determine and acquire required communication equipment and resources  Sub Skill 23.03 Specify communication procedures and protocols</p>	<b>2-4</b>
<b>DOMAIN I. MARKETING</b>	<b>16</b>
<p><b>Skill 24 Manage Marketing Plan</b>  Sub Skill 24.01 Conduct situational analysis  Sub Skill 24.02 Define target market segments  Sub Skill 24.03 Select marketing distribution channels  Sub Skill 24.04 Implement marketing plan</p>	<b>4-6</b>
<p><b>Skill 25 Manage Marketing Materials</b>  Sub Skill 25.01 Determine needed marketing materials for event  Sub Skill 25.02 Develop content and design parameters  Sub Skill 25.03 Produce marketing materials  Sub Skill 25.04 Distribute marketing materials</p>	<b>2-4</b>
<p><b>Skill 26 Manage Meeting or Event Merchandise</b>  Sub Skill 26.01 Develop product(s) design and specifications  Sub Skill 26.02 Determine pricing  Sub Skill 26.03 Control brand integrity  Sub Skill 26.04 Acquire merchandise  Sub Skill 26.05 Distribute merchandise</p>	<b>0-2</b>

<p><b>Skill 27 Promote Meeting or Event</b>  Sub Skill 27.01 Develop cross-promotional activities  Sub Skill 27.02 Develop contests (e.g., encourage registration, traffic builders, chapter challenge)  Sub Skill 27.03 Coordinate hospitality</p>	<p><b>3-5</b></p>
<p><b>Skill 28 Contribute to Public Relations Activities</b>  Sub Skill 28.01 Contribute to public relations strategy  Sub Skill 28.02 Contribute to publicity plan  Sub Skill 28.03 Manage media relations  Sub Skill 28.04 Contribute to implementation of publicity plan  Sub Skill 28.05 Manage response to crises and controversies</p>	<p><b>1-3</b></p>
<p><b>Skill 29 Manage Meeting-Related Sales Activities</b>  Sub Skill 29.01 Contribute to sales plan and objectives  Sub Skill 29.02 Conduct sales activities</p>	<p><b>0-2</b></p>
<p>DOMAIN J. <b>PROFESSIONALISM</b></p>	<p><b>2</b></p>
<p><b>Skill 30 Exhibit Professional Behavior</b>  Sub Skill 30.01 Demonstrate ethical behavior</p>	<p><b>2</b></p>

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## GLOBALIZATION TASK FORCE

### Chair

Vicki M. Hawarden, CMP  
President and CEO  
The International Association of Venue Managers

### Members

Janet Sperstad, CMP\*  
(2011-2012 Task Force Chair)

Martie Sparks, CMP\*

Cathy Breden, CAE, CMP\*

Karen M. Gonzales, CMP\*

Diana M. Hakenholz, CMP\*

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Grace L. Jan, CAE, CMP\*

Michael D. Gunn, CMP\*

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Laurie Bowering, CMM, CMP, CSEC  
President  
The Bowering Group

Amy Ledoux, CAE, CMP  
Vice President, Meetings & Exhibitions  
ASAE & The Center

Tyra Hilliard, PhD, JD, CMP  
Associate Professor  
University of Alabama, U.S.

*\*Denotes CMP Board Member*

## CTHRC PARTNERS

Philip Mondor  
Senior Vice President  
Canadian Tourism Human Resource Council

Roman Savka  
Project Manager, Foreign Credential  
Recognition Program  
Canadian Tourism Human Resource Council

## CMP-IS FOCUS GROUP

### Facilitator

Nancy Thomas Ahluwalia  
Sr. Manager, Test Development  
Prometric

### Members

Susan J. Hueg, CEM, CMP  
Director Exhibitions & Events  
National Business Media, Inc.

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Rhonda Eaton, CMP  
Event Services Manager  
Reno- Sparks Convention Center

Marcia Bradley, CMP  
Event Manager  
Hilton Anatole Dallas

Jane Dahlroth, CEM, CMP  
Meetings, Conventions & Exhibits Manager  
American College of Medical Genetics

Naomi Mundy, CMP  
Conference and Events Manager  
Employee Assistance Professionals Association

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Erin Tench, CMP, CMM  
Associate Director of Special Events  
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NACE (National Association of Catering  
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Bill W. Irwin, CMP  
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Ponte Vedra Inn & Club

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PCMA (Professional Convention Management  
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Kelly Peacy, CAE, CMP  
Vice President, Meetings and Events  
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IASB (International Association of Speakers  
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Edward E. Scannell, CMP, CSP  
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Melody Kebe, CMP, CGMP  
Network Services Directorate  
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Karen Kotowski, CAE, CMP  
CIC Chief Executive Officer

Lawrence Leonard, CMP  
CIC Chief Operating Officer

Christina Buck, CMP  
CMP Program Director



Convention  
Industry  
Council

700 N. Fairfax Street, Suite 510  
Alexandria, VA 22314 USA

[www.conventionindustry.org](http://www.conventionindustry.org)