



SCOPE OF SERVICES



Strategic Meeting Management

Your partner in innovation and strategic planning; your event is our event.

- Match department goals to organizational objective/culture
- Meeting design - agenda, logistics, cost, workflow, objectives
- Budgeting - P&L management, forecasting, cost per vendor, meeting and attendee
- Meeting cadence and calendar - communication, cohesion between internal departments, theme and messaging across multiple meetings
- Attendee experience and management - movement, flow, communication
- Business process - rules for approval, workflows, document SOPs
- Present vendors that solve problems and present effective solutions

Vendor Management

Source, select and manage vendors like they are our part of our team.

- Entertainment, décor and theming coordination
- Gifts and giveaways
- Rentals, radios, office equipment and more
- DMC sourcing and management
- Off-site event management

Virtual Event Management

Cost effective solution that is efficient and productive while allowing for a virtual connection.

- Strategy and design
- Research and recommendations for virtual platform
- Collaboration with AV/Production partner
- Virtual speaker management & training
- Logistics/Operations management
- Detailed run of show with rehearsals and dry-run
- Creative attendee engagement
- Back-end virtual moderators

Site Selection & Venue Sourcing

Secure a venue/space that aligns with your budget, goals and culture.

- Destination analysis
- Site selection
- Contract negotiations
- Contract oversight through entire program

Venue Management

Build and nurture strong communicative relationships with the venue partner.

- Main hotel/venue liaison
- Create and manage detailed function specs
- Oversight of venue diagrams
- Security and emergency planning

Financial Management

Make educated decisions by knowing your numbers in real time.

- Event (and multi-event) budget development
- Financial reporting and forecasting
- Hotel and vendor billing reconciliation
- Vendor payments, W9 management and 1099 processing

Project Management

Vested in the success of the event while effectively communicating and leading a team.

- Ensure overall project success and define roles/responsibilities
- Build out detailed timeline and track progress
- Facilitate meetings
- Hold team and vendors accountable
- Create an ESG (event specifications guide) with all event details and inclusions
- Track and measure data and goal outcomes

Rooming Management

Limit liability and maximize concession usage.

- Hotel room block and room list management
- Suite assignments and roommate pairing
- Amenities coordination
- Attrition / cut-off date oversight

Branding, Signage, Activations and Creative Oversight

Maintain a cohesive image across all creative platforms.

- Main liaison with in-house and/or external design team
- Creation branding/signage proposal/summary
- Diagram placement of creative elements
- Oversight of installation/placement management
- Digital signage coordination

Food & Beverage Management

Ensure your attendees have the energy to work, learn and enjoy themselves.

- Creative menu planning
- Banquet event order creation/management
- Strategic guarantee management
- Manage special meal requests and dietary restrictions

Speaker Management

High touch VIP management to ensure your speakers drive results.

- Speaker sourcing and payment oversight (honorariums/fees, expenses)
- Speaker travel (air, accommodations, ground)
- Speaker logistics prep calls and brief creation
- Content management (presentation decks, bios, headshots, etc.)
- Rehearsal scheduling and production liaison

Production and A/V Management

Innovate and collaborate with AV team to create a smooth, seamless and impressive audio and visual experience.

- Source, select and partner with production team
- Oversee production scope of work, budget, inclusions, and breakout assignments
- Creation of detailed rehearsal and run-of-show schedules

Day-Of Event Management & Staffing

It's show time - manage and execute all aspects of the event.

- Create and manage the master check-list and run-of-show with minute by minute assignments
- Team of professional event managers
- Temp staff analysis, hiring, training and management
- Vendor and venue oversight
- Load-in/out of supplies

Mobile App Strategy and Build-Out

Information at the touch of your finger - keep your attendees updated before, during and after the event.

- Source, select and execute mobile app
- Alignment with attendee communication plan
- Build-out of resource pages
- Creation of personalized schedules
- Surveys/Q&A's/Polling/Gamification
- Exhibitor/Sponsor inclusions

Registration & Travel Management

It's all in the details - track, report and maintain attendee data.

- Online attendee registration (Cvent preferred provider)
- Customer Service (Phone and Email)
- Name badge planning and logistics (onsite or pre-event)
- Reporting and data management
- Air/ground travel manifest management
- Development of detailed communication plan (pre event, onsite and post event)

Exhibition/Sponsor Logistics Management

Manage the movement and expectations of exhibitors/sponsors.

- Oversee trade-show floor design as it relates to attendee experience
- Contract and manage a general service contractor
- Establish exhibitor set-up, tear-down & rental requirements
- Customer service, communication plan, and support throughout program
- Sponsorship packet logistics execution
- Oversee lead retrieval and tradeshow technology



We know it takes a team...
let us be your right hand!

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