

# Best Practices for Field Conference Success

The focus of your conference should be on the field. The key to a successful event is to find ways for your home office and leadership to best serve and recognize the field and make a meaningful impact.

The following tips and considerations will help to ensure this focus.

## Why is this incentive meeting being held?

(Usually, there are a combination of reasons.)

- To reward and thank the field force for their production and loyalty.
- To use the meeting as a platform for major announcements/updates.
- To introduce new, key home office personnel hired since the last incentive meeting.
- To provide the home office time to meaningfully interact and build relationships with the field force.

## Why are home office team members attending?

Each home office attendee should know specifically why they have been selected to attend.

- Because of their title (president, senior marketing/sales officer, product actuary)?
- Because they are giving a presentation or making an announcement?
- Because they are in charge of A/V, technology, or are somehow involved in the formal program?

If they are just going to “help,” do you really need them to attend?



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## What is expected of all home office attendees and spouses?

- Establish the mindset that you are there to celebrate, recognize and reward the field's accomplishments...this is not a vacation for home office attendees and spouses.
- All home office attendees and spouses will attend all events to which they have been invited.
- Your overall task is to spend meaningful time with the field force. Never eat a meal, have a drink, go on an activity, attend an event, watch the sunset etc., without a member of the field force.
- Do your homework. Study whatever is provided prior to the meeting...names of qualifiers/spouses what city and agency are they from, diagram of hotel (for meeting spaces, breakout spaces, restrooms), pictures of attendees, who are the first timers, birthdays or anniversaries occurring at the meeting, etc... Be prepared.
- Use a checklist to ensure that all attendees have personal interaction with at least one member of the home office staff.
- Be flexible. If too many people sign up for an activity, choose a different one and let an attendee/spouse go in your place.
- Smile! Be sure to thank the attendees and spouses at every opportunity. Even if this is a little out of your personal comfort zone, it is very important. Attendees can sense if you genuinely want to spend time with them or are just going through the motions.

## Meeting Arrival/Departure Dates:

- Designate home office attendees/spouses to greet qualifiers at baggage claim (schedule greeters in blocks of 3 hours). Enthusiastically welcome them to the destination and assist with any needs, lost luggage or other issues.
- Designate home office attendees/spouses to enthusiastically greet qualifiers at the hotel lobby (schedule in blocks of 3 hours). Show them to check-in and remind them of hospitality suite location and hours and to pick-up their arrival packets.
- Staff the hospitality suite from open to close with home office attendees/spouses in 2 hour blocks.

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## **First Timers/Spouses Reception:**

This should be held as early in the meeting schedule as possible. The best time is 45 minutes prior to the regular welcome reception scheduled on the first or second night. This is by invitation of the president. All home office/spouses host. You want to make these folks feel special. Let them know what to expect for the next few days, learn what is important to them and their spouses, set the expectation that they will be perennial qualifiers and how much you appreciate them. It's most effective if the president personally welcomes the group.

## **Welcome Reception:**

The home office attendee who is the most comfortable using a microphone should welcome the group. Thank them for their business this past year, their loyalty and their support. Introduce all home office staff and spouses beginning with lowest ranking, ending with the president. Give a quick overview of the meeting (don't read the agenda!) and what to expect the next few days, and share how much fun it's going to be. Have the president personally welcome the group. Finally, announce the first function for the following day, where it is located and who is invited.

## **Mandatory Arrival Night Home Office/Spouse Meeting:**

- Have all attendees arrived? If not, (airline delayed, canceled flight, last minute cancellations etc...) then follow up.
- Go through the list of first time attendees. Ask for a show of hands of home office/spouses who welcomed them to the conference on the first day. If some got through unwelcomed, find out why and assign a home office attendee to seek them out first thing the next day.
- Did anyone learn anything about a qualifier/spouse the home office should be aware of/sensitive to, so that no one gets blind sided the next morning?

## **Mandatory Mid Meeting Home Office/Spouse Meeting:**

How has the meeting gone so far? Ask each home office attendee/spouse for relevant input. Make adjustments for rest of the meeting.

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## **Post Meeting/Debrief:**

This can be done onsite during the departure day evening or back at the home office. The advantage of doing this onsite is that the spouses can be included, and you can use that night as a “thank you” night/dinner for all home office attendees and recognize their contribution to the successful meeting. Memories are fresher at this time and it builds home office/spouse relationships.

Send a token of appreciation to all the field force.

It’s impossible to thank qualifiers too much! This is absolutely the best way to build meaningful relationships with your field force so as to lessen the home office (manufacturer) vs. field force (distributor) natural tension and create understanding that leads to better decision making for all.

The field feels special when given access to people, places, experiences and information that is not normally available to them and your conference is the perfect opportunity to do that.