

Convention Industry Council Manual, 9th Edition: Summary of Updates

Prepared by: Mariela McIlwraith, CMP, CMM, MBA, Executive Editor

Overview

The *CIC Manual, 9th Edition* was released in April, 2014. The Manual has some significant differences from previous editions. The first notable difference is that it has been reorganized to follow the CMP International Standards (CMP-IS). The CMP-IS replaces the previous CMP Blueprint – and outlines the expectations for CMP candidates as well as current best practices in the meetings management industry. In addition to the reorganization, the Manual has taken a more international approach than previous editions. As such, the 9th Edition replaces the *CIC Manual, 8th Edition* and the *CIC International Manual*. A team of more than 50 international authors and reviewers supported this global approach to meeting and event management. Project Management, Human Resources and Stakeholder Management are new Domain areas that were introduced in the CMP-IS. Although previous editions addressed these themes, they have been explored more extensively in the 9th Edition. While previous editions of the *CIC Manual* and the *CIC International Manual* included chapters on green meetings, a greater focus on sustainability has been integrated throughout the Manual in keeping with the CMP-IS and the inclusion of sustainability as a distinct knowledge set.

The *CIC Manual, 9th Edition* and the Certified Meeting Professional Program

The *CIC Manual, 9th Edition* is a recommended book for preparing for the Certified Meeting Professional (CMP) Program. It should be noted, however, that the CMP Program and Exam are based on the CMP-IS, and not directly on the Manual. Candidates preparing for the exam should begin their preparations with a thorough review of the CMP-IS, available free of charge from www.conventionindustry.org and identify gaps in their professional experiences and knowledge areas. The recommended materials for the exam can then be used to supplement direct experience.

CIC Manual 9th, Edition: The Domains

As mentioned above, the *CIC Manual* has been organized according to the 10 domains of the CMP-IS. These are:

- A. Strategic Planning
- B. Project Management
- C. Risk Management
- D. Financial Management
- E. Human Resources
- F. Stakeholder Management
- G. Meeting or Event Design
- H. Site Management
- I. Marketing
- J. Professionalism

The remainder of this document will provide a high-level overview of what is covered within each of the above domains, with an emphasis on what has been revised from previous editions.

A. Strategic Planning

This domain includes three skill areas: managing a strategic plan for a meeting or event, developing a sustainability plan for an event and developing a business continuity or long-term viability plan for of a meeting or event. This domain sets the direction for all decisions about event management. It establishes that goals and objectives for the event should guide all processes, and provides guidelines on how to develop these goals and objectives and how to use them to develop and implement a strategic plan. Although sustainability is a recurring theme throughout the manual, in this domain an overview is provided for developing a sustainability plan. Included are recommended best practices for each of the nine APEX/ASTM Sustainable Meeting Standards. Finally, this domain covers topics related to ensuring the long-term viability of an event. This includes how to measure an event's return on investment and best practices for evaluation and auditing of an event and of its risk management plan.

B. Project Management

When planning an event, the event professional is undertaking the management of a project from beginning to end including logistics, budgets, resource deployment and schedule management. This domain draws from best practices from the project management field and applies and adapts them to event management. This domain includes tools and processes for planning and managing an event including developing a critical path, issuing requests for proposals and managing contracts.

C. Risk Management

Risk management, as applied to the events industry, is the ongoing process of assessing the risks that may threaten attendees, the meeting or event itself, or stakeholders and applying the appropriate measures to manage the probability and consequences of such risks. This domain focuses on managing serious risks that may threaten life, health, property or the financial viability of a meeting, business or organisation. It includes processes for identifying, assessing, analyzing and managing risks. The event professional has three choices when facing risk: accepting/ignoring the risk, managing/mitigating the risk (including transferring the risk to someone else, such as through insurance) and avoiding the risk. Each of these options is discussed to determine when they would be the most suitable choice.

D. Financial Management

This domain covers three critical skills that are needed for the financial success of an event. These are: managing event funding and reserves, managing the budget and managing monetary transactions. Managing funding sources includes best practices for sponsorship acquisition and retention, grants, registration processes, exhibit sales and other miscellaneous revenue sources. Managing the budget includes a list of sample budget items, managing foreign exchange risks, pricing strategies (including break-even analysis and budgeting for profit), and monitoring and revising budgets. Under managing monetary transactions, accounting basics and establishing and monitoring cash handling procedures are reviewed.

E. Human Resources

The event professional's role has expanded and now includes aspects of human resource management. This may involve recruiting and training staff and volunteers, as well as managing workforce relations. This domain includes steps and international resources for major human resource functions such as developing selection criteria, selecting candidates, offering positions, providing orientation and training, supervising staff and volunteers and managing teams.

F. Stakeholder Management

All organisations affect, and are affected by, the environment within which they operate and the people within that environment. In the case of events, this includes various stakeholders including attendees, workers, suppliers, and the broader community. This domain provides best practices for managing stakeholder relationships including identifying, assessing and categorizing internal and external stakeholders, managing stakeholder activities and communications. The domain also includes recommendations regarding stakeholder communication, recognition, conflict resolution and legal considerations.

G. Meeting or Event Design

The largest of the domains in the Manual, Meeting or Event Design encompasses a range of skill areas from programme aspects (developing the programme and engaging speakers and performers) to logistics aspects (coordination of food and beverage services, designing the event environment, managing the technical production and developing the plan for the movement of attendees). This domain differs from previous editions in that it explores concepts related to design thinking, and reflects how the industry has evolved to be much more strategic in programme design. An updated list of delivery formats is included, as well as focus areas on Meeting Architecture and Gamification. How to engage audiences, speakers and performers for live, hybrid and virtual meetings is discussed for each type of event. Selection criteria, contracting and communication best practices for speakers and performers are also included. This domain also examines food and beverage services, including determining requirements, sustainable practices, dietary needs or concerns, cultural and religious requirements and compliance with legislations and regulations.. With respect to the design environment, set-up formats have been organized according to the level of audience interaction from a presenter-focused approach, to partially interactive to highly interactive environments. Recommended space requirements for set-up styles are provided, as are recommendations for event signage. Managing technical production such as audio, visual, lighting, staging, labour, transportation, hybrid or virtual productions, capturing event content and webcasting is reviewed. Finally, this domain encompasses admittance credential systems, crowd management, transportation and protocol requirements.

H. Site Management

The Site Management domain covers all of the details that the event manager must supervise at the venue, area, location, property or specific facility to be used for an event. It includes site selection, designing the event's layout, managing the event on-site and event communication. Resources for destination selection and characteristics of different types of event venues are

reviewed. This domain also includes accessibility considerations. Although previous editions focused primarily on the Americans with Disabilities Act with respect to accessibility, this edition provides more general guidelines for event professionals that can be utilized globally. This domain also reviews site inspection guidelines and site layout considerations, as well as developing plans for venue set-up and dismantling and shipping of event materials to and from the site and across borders. Finally, this domain covers establishing an on-site communications framework as well as communication equipment, procedures and protocols.

I. Marketing

The term “event marketing” can have two meanings: marketing an event, or using an event for marketing purposes. This domain focuses on the former, more specifically, the skills required to promote an event. The domain begins with steps for developing and implementing a marketing plan, including conducting a situational analysis, defining target market segments and selecting marketing distribution channels. A sample marketing implementation plan is provided. Also covered in this domain are best practices for managing marketing materials and event merchandise and steps for promoting an event. Finally, this domain also includes public relations activities and managing meeting-related sales activities.

J. Professionalism

The final domain in the Manual relates to expectations for professionalism in our industry. This includes professional conduct and standards of behaviour. Also included in this domain are expectations related to demonstrating ethical behaviour, examples of ethical issues in our industry and creating and implementing an ethics code or policy. The domain concludes with a review of the CMP Standards of Ethical Conduct Statement and Policy.