Meetings, Events & Group Enquiry Handling

Best Practice Guidance

Whilst recognising that different procedures and guiding principles exist across the industry, this is **beam's** recommended best practice for Agency and Supplier Members working together on enquiry handling and option management.

The terminology shown below is commonly used within the industry, with definitions agreed by all members.

It is advised that all communications between agency/supplier/client are made in writing.

Terminology:

Client: An organisation, company or individual requiring facilities/services/products from agencies and suppliers.

Booker: An individual with booking responsibilities who may work for either for an agency or a client organisation or be a private individual.

Prospect: An opportunity for business.

Enquiry: Enquiry only, no space/facilities being held. Suppliers may choose to hold space while the enquiry is fielded.

Rostered: An appointed supplier, generally following a procurement process relating to the provision of services for calendar period or specific event/requirement.

Provisional/provisional booking: Space/facilities being held on 1st, joint/shared, 2nd and further options:
Supplier to indicate option and decision time frames on higher options.

- **1st option** = provisional space being held for one client at any one time.
- **Joint /shared option** = provisional space being held for one or more clients at the same time
- **2nd and subsequent options** = holding space behind whoever has 1st option etc.

Option release date: The date and time specified by the venue until which the option will be held. It is essential that option status and option release dates are clearly communicated to the agent/client.

Race for space: Space is offered to multiple agents and/or direct clients on an equal option basis. The first party to confirm the space with a signed contract (and deposit if required) secures the space and the other parties(s) will be advised that the space is no longer available.

Conversion: The change of status for a booking e.g., from a provisional booking to a confirmed/definite/contracted booking.

Released: Business that the agent and supplier were holding provisionally, regardless of option basis, which has been subsequently released by the supplier, agent, or client direct.

Confirmed: Verbal or written confirmation that the booking is going ahead has been received from the agent/client, but business is not yet contracted though contract may have been issued.

Definite or Contracted: Signed contract returned, and terms & conditions agreed.

Terms & Conditions: These form part of the booking contract or can be provided separately by suppliers, agents and clients, and are agreed as part of the contracting process.

On Allocation: Accommodation room block against which individual bookings are made.

Group accommodation: A booking of multiple rooms (the minimum number varies according to the supplier's policy) for the same date(s), for which a booker will provide a rooming list and is financially and contractually accountable.

Refused/Denied/Turned Down: The Supplier is not able accommodate or accept a booking and has declined the enquiry.

Conflicting business: A booking may be declined/refused due to business sector clashes or competing business already contracted at the venue. An agent/client may ask if there is any potential of conflicting business when making an enquiry. e.g. pharmaceutical clients with conflicting competitors.

Response time: Deadline or time frame specified by the agent/client, or by the venue, as to when information will be provided/is required.

Cancelled: A contracted booking has been cancelled, and Terms & Conditions apply.

Wait List: Where there is no availability, a wait list is introduced.

Deadline: Agreed time scale for a decision to be made.

Chasing: Request for status updates between agency/supplier/client relating to a booking or availability.

Multiple Agents: The same enquiry being received by the supplier from multiple agencies.

Overnight hold: Event space is blocked overnight and is not used for another client or internal function.

Contracted tenancy hours: The hours that the contracted event space can be utilised.
Exclusive use of event space: No access allowed to other guests, and site inspections/ showrounds cannot take place within the space for the duration of the event, unless otherwise agreed.
Total exclusive use: Relates to the areas requested and could mean total building. No other clients or guests allowed in the building for any purpose e.g. for afternoon tea, drinks at the bar etc. This may exclude the leisure club if the venue has a private membership.

Showround: An in-person appointment where the agent/client visits a venue for familiarisation/product knowledge purposes. Usually pre-arranged, allowing the venue an opportunity to showcase facilities and services, but may be requested on the spot. Venues may also or alternatively provide a showround via a virtual platform or pre-recorded digital content which allows the agent/client to view and 'walk-round' the venue remotely.

Site inspection: A pre-booked in-person appointment relating to a specific enquiry or event. When arranging a site inspection, venues should check all relevant space and facilities are available to view and preferably that the inspection is conducted by the person dealing with the enquiry. The agent/client should be advised in advance if all space/accommodation/relevant area of the venue is not available to view and be updated prior to visiting the venue if the situation changes.

Floor plan: a plan showing the footprint of a venue/event space, or a bespoke plan designed for a specific event.

Book out/Out-booking: The contracted venue is no longer able to accommodate the booking.

Meetings, Events & Group Accommodation Enquiry Handling Guidelines

From the Agency Member's Perspective

It is recommended that all communications between agency /supplier /client are made in writing.

1. Fully qualify the client brief to ensure correct supplier selections are identified and that in the first instance, only suitable suppliers which meet the criteria are contacted. This ensures that both the agency's and supplier's resources are effectively used to work on enquiries appropriate to that supplier.

2. Advise the supplier of enquiry turn-round/response time.

3. Advise the supplier of any specific client and/or agency terms and conditions relating to the business when making the enquiry.

4. Where appropriate, seek clarification on suppliers' cancellation policies, minimum numbers, and terms, and be responsible for informing their client of same.

5. At the time of enquiry, provisional bookings to be made to secure all required facilities.

6. Client reference to be given, preferably the company name, so that the supplier can check for conflicting business already placed, or to advise if the enquiry has already been received from another source. In the case of commercial sensitivity, the agent should provide industry sector as a minimum.

7. It should be established if there is an automatic release date, and any option expiry date should be mutually agreed.

8. If requested during the enquiry process, advise the supplier of the preferred payment method.

9. While space is being held, the agent should keep the supplier advised of any change of circumstance relating to the booking and share appropriate information to help the Supplier understand the likelihood of the booking converting.

10. Work with the supplier to establish option status, management of the option and communication with the client.

11. Agreed deadlines should be adhered to by all parties.

12. Where appropriate, site inspections should be made within an agreed timeframe.

13. Provide relevant feedback to suppliers post site inspections/showrounds. Confirm relevant space and send accurate confirmation within the agreed timeframe.

14. Release other space immediately, explaining why the supplier did not win the business, and where it has been placed.

15. Check with the client to ensure the contract has been signed and returned to the supplier, with relevant deposits.

Meetings, Events & Group Accommodation Enquiry Handling Guidelines

From the Supplier Member's Perspective

It is recommended that all communications between agency /supplier /client are made in writing.

1. Provide accurate information on the space available for the enquiry and its suitability for the booking.

2. It must be made clear to the agent at enquiry stage on which basis the option is offered/held, with the status and timeframe of the 1st option disclosed.

3. Hold in client name/industry sector and agent name, with any relevant reference advised.

4. Check for competing business, or the same piece of business, or conflict of interest within the venue, providing information relating to the client's identity has been given by the agent – and inform the agent accordingly.

5. A booking should not be considered definite until the contract is signed and received by the venue within the agreed timeframe.

6. Block the booking in the relevant diary and property management systems immediately.

7. Venue to advise time validity of rates offered if applicable.

8. If offering an option/release date/time or deadline, advise the agent accordingly.

9. Understand your venue's terms and conditions and payment policies and advise the agent of these at enquiry stage.
10. Inform the agent if the venue will be undergoing any renovation or refurbishment at or around the time of the event, either at enquiry stage or as soon as the venue has validated information.

11. Venue to advise agent if and when option status changes.

12. Agreed deadlines should be adhered to by all parties.

13. Chases and updates should be made as the business dictates/demands.

14. Should the contract not be returned within the agreed timescale, contact the contract holder in writing. Venues reserve the right to release within 24 hours of a given deadline.

15. Venues should advise agents of commission policy at enquiry stage.

Guideline Questions for Supplier Members During Enquiry Process When Working with Agents

This guidance can be used where no alternative process is in place where no alternative process is in place.

Please note that these questions may not match your own booking process flow.

1. What is the name of the client company/organisation? If commercially sensitive, then reference and industry sector.

2. Is there flexibility in the brief and the dates provided?

3. What is the budget and preferred style of venue?

4. What is the purpose and objective of the event?

5. What is the frequency of this event?

6. Where has this event been held previously?

7. Who are the attendees?

8. Where are the attendees travelling from?

9. Which other destinations/locations being considered?

10. Where will the client NOT go/consider?

11. How many options will be proposed to the client?

12. What other venues are being considered and what rates are they offering?

13. Are any other agencies involved?

14. Have you secured this business or are you pitching?
15. What are the timescales?
16. What is the decision date?
17. Who is the decision maker?
18. Where relevant, when will site inspections be arranged/taking place?
19. What is important to the client for this event (deal breakers etc.)?
20. What are the timings for the event?
21. Is early access required for set-up/preparation?
22. Is overnight hold required?
23. Is late access required for breakdown?
24. Is overnight accommodation to be contracted or on allocation?
25. How will payment be made?
26. What are the payment terms?
27. Does the agent have everything they need to put your venue forward?
28. What can we do further to help you win this business for our venue?

NB: If the venue believes the enquiry lacks depth or is vague, it is not compelled to hold space although it should ensure the agent is aware of this.