

THAT'S THE PLAN

INNOVATIVE IDEAS FOR SUCCESSFUL PLANNERS

Reservations for Three, Please



BY
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Try visualizing yourself as you read the following paragraph.

I'm not a meeting planner, I am a visionary. I can see what others can't. I see how people will get to the event, what they will eat, what they will learn, how they will have fun and why they want to attend. I also see who should be involved in the event to have it flow smoothly and within budget. I see the big picture because you've hired me to—and human resources (HR) and training departments don't.

Remember a time when meeting planners handled meeting planning, HR took care of HR needs and training departments concentrated on training? Although these functions are still on opposite banks of the corporate river, bridges are being built. And now, more than ever, these distinct functions are facing common challenges that we must work together to overcome.

The Challenges: E-learning and Workplace/Family Issues

One of the fastest-growing learning methodologies is e-learning. This method is packaged in the forms of Web seminars, online courses, preprogrammed learning and videos/CDs. C-level management and HR administrators have welcomed e-learning primarily because of its cost-effectiveness. All functions agree, however, that the e-learning environment is impersonal compared to in-person instruction.

But will those opinions carry more weight than the cost savings? The American Society for Training and Development thinks it might be possible, noting that learners at a typical company get 20 percent to 30 percent of training via technology (that is expected to rise 20 percent within the next five years).

Workforce and family issues will also continue to impact HR, training and meeting-planning functions. HR's focus is at the front

end of the recruitment and retention challenge. Consider the looming baby boomer retirement wave. The U.S. Bureau of Labor Statistics says the United States will face a shortage of 10 million workers by 2010. To replace a generation slowly realizing that there is more to life than work, a new generation of workers will need a lot of training in a hurry. So don't close the classrooms or meeting venues. They will be needed for discussion, team learning and higher-level interactions.

As companies strive to compete in the global marketplace, family issues will continue to be an obstacle adding to an already burdensome array of challenges such as fluctuating foreign markets, differing cultures and languages and the need for increased security measures.

The Institute for Workplace Studies at Cornell University claims U.S. industry loses up to \$300 billion annually in absenteeism, diminished productivity, employee turnover, accidents and other medical, legal and insurance expenses. These increasing operational costs have removed funds from annual meeting budgets, thus affecting the meetings industry.

Overcoming the Challenges: Cross-training, Outsourcing and Collaboration

For meeting planners, simply sitting at the same table with the other two functions isn't enough. Understanding their challenges and knowing what their responsibilities are reinforces the strength of bridges. Meetings are still the primary method for adult learning. The need for strategic corporate updates, training and continuing education has never been stronger. The timing for cross-training could not be more germane. The pressures of getting the right talent will increase as we approach 2010, and employers who help

workers develop the fastest with the least hassle will stay on top.

Cross-training in these three functions is prominent for several reasons. For the trainers still wondering what to call themselves, technical training is the only chance of survival. New technology may have slowed them down, but it didn't negate their capabilities and expertise. They need to remember that new hires grew up on mobile phones, instant messages and the Web. While HR issues such as recruitment and retention remain critical, HR personnel have their eyes on benefits.

Significant increases in healthcare costs are expected to continue, and the current generation of HR leaders will be much more involved in aligning HR strategies with companies' overall business objectives. The last thing HR professionals are concerned about is meetings.

Outsourcing is a hot topic, whether it's outsourcing U.S. manufacturing jobs to other countries or moving in-house functions to outside vendors. Outsourcing is typically defined as a buyer transferring ownership of a process to a vendor or supplier with expertise in that process. Although most corporate leaders would like to have the work come from internal departments, with the pending workforce shortage it isn't probable. However, this probability assures a seat at the table for the independent planners, trainers and HR vendors. As for the corporate planner, outsourcing has positioned you to decide on the table and with whom you will sit.

According to The Outsourcing Institute's *Fifth Annual Outsourcing Index*, corporate expenditures on outsourcing services and technology is on the rise. Fifty-eight percent of respondents are at the first stage (assessment) of the outsourcing process, 12 percent are at the second stage (RFPs), 12 percent are at the third stage (selection) and 17

percent are at the last stage (governance).

By the end of 2002, it was estimated that \$320 billion in corporate resources lay outside of corporations. According to the same survey, the top five reasons for outsourcing (in order of buyer company requirements) are to improve company focus, reduce and control operating costs, free internal resources for other purposes, gain access to world-class capabilities and access resources not available internally.

Now try to visualize the planner as an orchestra leader, one who knows the other two instruments (functions) can't create the same sound individually as they could with an orchestra. In October 2003, meetings technology consultant Corbin Ball predicted, "Face-to-face meetings will remain strong. However, they will change in nature and move from the 'talking head' to greater interactivity and audience empowerment."

It is my prediction that the meeting planner will make the reservations. The planner's place setting at the table resembles that of a conductor. As an orchestra leader, you already see the big picture and understand the importance of meetings and how they impact our economy. Adding the other two instruments will be a natural transition. All that's left for independent and corporate planners is to make reservations with HR and training to create the music.

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