



NOTES ON CONFERENCE PLANNING

SFWA PROFESSIONAL EDUCATION



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The Conference

Why have a conference at all? What is the unifying purpose?

This class is based on my experiences putting on two conferences: 20booksto50k Las Vegas in November 2017, and 20booksto50k London in February 2018. Two additional conferences are planned, another in Las Vegas in November 2018 and one in Bali in January 2019. There will also be a writing retreat in Edinburgh in July 2019. While my notes are specific to the 20booksto50k conferences, the premise should relate to other conferences and conventions as well.

20booksto50k was a premise that Michael Anderle had. It's based on simple math, breaking down the numbers to yield a bite-sized chunk in order to earn a living wage from your writing.

It's about being a professional author. That means, selling your books. Finding readers willing to buy your books. Our unifying purpose for 20Books Vegas was about indies helping indies. Everyone is in a different spot on their journey.

Everyone needs a different tidbit of information to get them over that next hump. We all need the same information. We all need different information. We need it at different times. And then sometimes we can forge our own way ahead. But someone else has already done it successfully, while others have failed. Take the good lessons and forge ahead.

Leave the bad lessons by the wayside.

Find a unifying purpose and you'll have a reason to hold a conference.

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Arrange Guest Speakers simultaneously with reserving space

Talk about chicken and the egg. Until you know your guest speakers and the number of people who may attend, you will have a hard time finding the right-sized space.

For 20Books Vegas, we reserved a room that could handle 650 people, but our break-even point was 250. That gave us a lot of room. How did we know what our breakeven point was? That will come later, something else that you need to know before you've even started.



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We called places and checked online, but until we had an incredible volunteer go to Vegas and beat on the doors of a dozen hotels and conference centers, we didn't have a place to call our own. Finally, Sam's Town came back to us with the best offer in regards to rooms.

Negotiating points:

- Cost of the conference room can be waived by guaranteeing a certain catering minimum
- Room nights (number of nights that your conference attendees stay in the hotel – the higher the room nights, the more clout you have in negotiating)
- Electronics – most hotels have exclusivity contracts as in, you can't bring your own stuff in. They grossly overcharge, but that's how they pad their bottom line. They'll give you a price list. Understand what you are getting and ask yourself, do you really need it? We encouraged our guest speakers not to have anything that needed to be projected. Cost savings was nearly \$1000 by using handouts in packets instead
- Extra outlets in the conference room – this is a pure cost, but in this day and age, being able to plug-in during a long day's conference has a great value, since most conference rooms have almost no outlets. We paid \$1500 for 300 extra outlets scattered throughout our conference room
- Breakout rooms – these can be clumped in with your main room. Make sure you have enough space for everything you are trying to accomplish. Give the people room. Being squashed in isn't the best learning environment, either in the main room or breakout rooms
- Wifi for your conference room may be extra – verify that
- Rental for your audio/visual equipment is by the day, not for the full event
- The cost to rent for a half day or a full day could be the same. If it is, just take the room for the full day and that way the hotel will have it set up early so you can put out some banners do other prep-work without issue if you need to because you'll own the space
- Catering – if you have your people there for a full day, get them something to eat. To control your conference schedule, it's better to pay to feed them than to have them disappear. Sure, we're all adults, but the value that you deliver requires a little bit of leading the thoroughbreds to water.
- IT Questions to ask your hotel:
 - Is the provided wifi sufficient to live-stream the presentation? If not, how can we get at least one exclusive high-speed internet connection?
 - What is the connectivity to the projection system (such as, HDMI male or female)? Will tech support be available? Who is our Point



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- of Contact for issues related to the room during the conference (and please include a phone number)?
- Will there be outlets for the computer to be used to drive the projector?
 - How many microphones will we have available? We need at least two cordless, preferably three, and how can we ensure they don't run out of juice during the show (i.e. what battery size do they take)?
 - Can we hook up audio to the system to play music during the breaks? What connector will we need to accomplish this?

Controlling Attendee Numbers

Gauging the number of guests is important. You have to have a ballpark figure to get started, but dialing in the catering numbers takes real sign-ups. I recommend a cost structure that helps you rein things in.

- From when you open registration until three months prior to the show, charge your first price (in this case, \$99)
- From three months to two months, charge your second price (\$199)
- At two months out, you should be able to order your swag, badges, and stuff like that. The people who paid the extra registration amount will cover the costs and risks as you hedge forward – order more than what the numbers show
- At two months and less to show time, it is best if you have registration locked, but doing that is hard. You'll have people fall out and others who could use what you're pushing at your convention. From two months to one month, I recommend something on the order of \$299 to offset any costs associated with last minute phone calls to the venue to up your numbers.

Using price to encourage earlier sign up and discourage late sign ups is one way to help you control your numbers, or at least cover the costs associated with last minute additions.

The Schedule

Keep in mind your general conference theme. Begin with the end in mind. At the end of the conference, how do you want people to feel?

Build them up one piece at a time as if you are building a house – start with the foundation. Set the expectations of a shared journey and make sure everyone knows what is going on. Having both a printed and digitally available schedule



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is important. Conference attendees will get frustrated if they don't know where they need to be and when they need to be there.

The Space

More chicken & egg stuff. If you plan to do things that require people to write or type on their laptops, then give them the space to do that. Tables are best for ergonomics, but don't have the attendees sitting on top of each other. If the conference room says it can seat 250, DO NOT put 250 people in there. They won't have room to move.

In Vegas, we rented a space that could hold 650 people and we capped the conference at 400. We'll have tables and plenty of space to move around. We'll have snacks & drinks available throughout (budget for this and make sure you know the full costs – in Vegas, whatever the catering cost shows, we need to add 26.25% because of taxes and mandatory gratuity).

The Guest Speakers

These good people are your drawing power. You need to give them the red carpet treatment. For 20Books Vegas we were truly blessed by having an all-star cast volunteer to speak with us, and they even paid their own way. What an incredible testament to our premise of indies giving back to indies.

Of course, it doesn't hurt to have the venue in a place that doubles as a neat vacation spot. Another point to consider when organizing a conference. Make sure you are able to share the other amenities offered at your location. You can post links online or share information in the handout packet.

Pre-Conference Prep

Stay in touch with the hotel. If you aren't on a first name basis with everyone who has anything to do with your show, you're doing it wrong. Don't be a pest, but be complimentary and make sure you haven't assumed anything. Keeping everything in writing will help you have a shared understanding of your conference.

The hotel is there to make sure you have a good experience. Some things you want may have an additional cost. Understanding that up front and what those



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costs will be will go a long ways in making sure that you don't add stress and friction to your lives.

A step-by-step walk-through of what you want as you are shaping your conference helps immensely. If you can't do the in-person thing, then you will need to spend some time on the phone.

Have both digital and printed copies of the material you want each attendee to have. We bought a high-capacity printer solely for this purpose as we were going to have about 5000 pages of printed matter to hand out. We cleaned out Walmart for their folders, but it was the best price and one-stop shopping.

You'll need to start printing stuff early, but don't start too early because things will change! You only want to print and stuff folders one time. We had an incredible volunteer to do all that for us and arrived at the show in a minivan packed with ready-to go folders.

Make sure that you are aligned with your electronics package. Just know that you'll have to pay the price for the projector, screen, and sound system. Get it right and ensure that your guest speakers are able to project whatever they want. We asked them to bring their own computers so we didn't have to deal with software compatibility issues. We knew the projector had an HDMI interface. We informed the guest speakers, and we had a volunteer who coordinated it all, to include bringing extra interface cables just in case.

Signing Up and Paying

This will present your first technical challenge. We created a unique website, built in WordPress with embedded forms with PayPal.

It took a few trials & errors to get this right before we went live, but we had no problems with it at all. We paid for both WP plugins to make sure that we had technical support to resolve any issues.

Here is the information we collected for the sign up

- Real Name (mandatory field)
- Pen Name
- Name for your badge (mandatory field and to share publicly as part of the published attendee roster)
- Address
- Email Address (mandatory field)
- Website (to share publicly)



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- Primary genre you write in
- Secondary genre
- Number of published novels (this is not a mandatory field, but I threw folks for a loop by not having an option for “0”. Next time, I’ll make sure that 0 is one of the drop downs. 0, 1, 2-3,4-5, 6-10, 11-15, and 16+.
- Number of published works other than novels (drop down with 0, 1, 2-3,4-5, 6-10, 11-15, and 16+).
- PayPal email address (mandatory field – used for verification of payment only)
- Cups of coffee that you’ll drink each day (this was to best guesstimate the catering numbers – non-mandatory field)
- Cups of tea (again, catering)
- Number of donuts you’ll eat (again, catering)
- Biography (a free-form paragraph for information that the attendee is willing to share publicly)
- General annual revenue (not mandatory, but won’t be made public – we used this for a general show demographic) Dropdown boxes for 0-\$10k, \$10k-\$50k, \$50k-\$100k, >\$100k)
- Will you be staying at the venue (mandatory field) (this was to bounce off the hotel to see if we were meeting our obligation – we received a nice cost break because for a conference with an estimated 300 attendees, we gave them over 1000 room nights)

A total of five mandatory fields was all for our tracking purposes. The integrated PayPal app worked superbly, although some people were able to sign up (about 2%) and record their data without finishing through PayPal. We simply sent them an invoice and half paid. The others bailed out, but at least we knew.

I issued refunds for the show right up until I submitted the final catering numbers. If I received a request for a refund, I jumped on PayPal right there and sent it to them. I didn’t want anyone to think we were anything less than forthright with the show’s funds.

Swag

Make sure you have some graphics skills or have a volunteer with the skills as each of the below services wants their graphics in a little bit different format and at different resolutions.

- Badges – 4imprint.com
- Lanyards – nationallanyard.net
- Pens & Notebooks – pens.com
- Cups, tshirts, towels, notebook covers, & more – society6.com



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Volunteers

You need help. A great deal of help. People are willing to help, but don't abuse that trust. Know what you need to do, set clear expectations, and be patient. The conference director does about 90% of the work, but that last 10% is critical to show success. The volunteers will take care of that and they will be the face of the show.

You can't be in all places at all times. Break out the tasks and get help. Here's what we did for 20Books Vegas.

- Breakout room coordinators – responsible for schedule (in case of ad hoc sessions), posting the name placards of the speakers in those rooms, and generally keeping things on track in the smaller rooms
- Attendee packet printing & stuffing
- Raffle coordinator – run the raffles at the show
- Guest speaker IT coordinator – make sure of no technical glitches
- Check-in desk coordinator
- General assistant to the director (I need help at the show because I want to help everyone)
- Logistics coordinator – someone who lived locally and had space. We incrementally shipped our swag and other conference stuff to him and then he delivered on the morning of the show where we had plenty of hands to help.

Advertisers

The conference represents an organization or a brand or something unique that has drawn your attendees. We initially contemplated sponsors, but then canceled that idea because we didn't want to be in a position to vet those who would donate to the show. We didn't want to promote one service over another.

We dispensed with sponsors and went with advertisers and supporters. We set up an advertisement with half or full-page full-color print ads with a corresponding piece on the web page. Simple as that. We posted a disclaimer that the conference was not responsible for claims or services made by individual advertisers.

We also added a conference donation button. By running lean and not profiting from the show, we limited catering. Donations helped us keep some of the nice things to have like doughnuts, fruit, and cookies for all the sessions.



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Conference Check In

Keeping this easy is critical! People should only need their name. If they aren't on the list, your check-in crew should have a laptop and a way to check/verify that the person paid. With authors, so many have multiple names, they may not exactly know under which name they signed up. If you have a list of real names, then you must control that!

Many authors do not want their real name associated with their pen name. Respect their privacy by controlling access to their information. Have this as a back up along with PayPal receipt info. I expect you won't have issues – this isn't something that generally comes up.

We had very nice badges printed (or a sponsor could provide) with a blank space for attendees to write whatever they wanted for their name. If you pre-print them, they look nicer, but what a logistics nightmare for check-in and re-printing. People change their minds on what they want to share. Tell them that they'll write their own name. Have sharpies at the check-in table.

Swag should be pre-packed. One set for each paid attendee. We went with a pen and notebook because we do writer's conferences. We imprinted the logo on the notebook and did a nice print and our tagline on the pen, which had a metallic barrel with the rubber-tip that could be used to tap on a touchscreen. They were about triple the cost of the cheapest pens, but cheap pens are exactly that. Show some class.

Dress for the job you want, right?

Health Concerns

Make sure that you know your audience. All conference facilities should accommodate those with disabilities. But what about allergies and things like that?

We bought the Purell wipes and included a couple in each attendee's packet. We also put bottles of hand sanitizer on the tables (not all, but a good sampling) in addition to boxes of facial tissues.

Make the people comfortable and they'll have a better conference. Don't just take their money and put on a program. Show them that you care.



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Keeping to your schedule

Someone has to ride herd on the guest speakers. Some will talk for as long as you let them. Some will run short, but it doesn't even out. The chances of running long are far greater than getting done early. The conference director has the ominous task of keeping the schedule on track.

I put in long breaks to help us flex and generally only two forty-five-minute sessions back to back. That makes it easier on the crowd as you don't want people trapped in their seats for more than an hour and a half at a pop. They need to get up and reenergize.

And the 20Books conference is about networking as much as the presentations. How can you do that if there's no time to stand around, drink coffee, and talk?

Be ready to flex (this is the value of an online schedule) – if a guest speaker can't make it at the last minute, that's okay. That happens. Your guest speakers are important people with families. Have a back-up in mind and ready to go. I had a presentation ready should a fill-in be required, since I was going to be in the main room at all times anyway.

The Raffles

We had a raffle at the beginning of each section following a break. We bought a bunch of 20Books gear (notebook holders, insulated mugs, etc) and we took donations of non-fiction books relating to self-publishing.

Each badge had a number and we had the raffle tickets for those numbers. This way, no one lost their ticket and it encouraged people to get back on time because of the cool packages that were raffled away. Must be present to win☺.

We wanted to keep the 20Books brand (a concept, not a commercial product) front and center during the show, so we added a raffle for anyone sporting the 20Books gear (that we had made well before the show). When we spotted someone wearing the gear, we gave them a raffle ticket, putting the other half in a bucket to be drawn each day. We had three different editing packages donated, and these were the 20Books gear raffle prizes. We selected a ticket at the end of each day (must be present to win).



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General Timeline

One year to eighteen months before the show

- Determine conference purpose and general number of attendees
- Find venue location and sign contract
- Send out feelers for guest speakers

Six to nine months out

- Build website
- Start taking sign-ups
- Build Newsletter list
- Rough out schedule
- Advertise and get people to sign up so you can solidify your numbers

Three to six months out

- Send newsletters and share information
- Order your gear (we had over 400 sign-ups so we ordered 500 of everything with the intent to sell the excess pens and notebooks at the show)

One to three months out

- Don't panic, but the pace picks up at this point
- Confirm with the hotel any details that you can't confirm (check and recheck your paperwork)
- Keep the attendees informed – start building excitement with a countdown to the show
- Stay in touch with the guest speakers (one thing we did for the show was buy really nice gifts for the guest speakers since they paid their own way – we bought these out of our pockets, because we wanted everyone to feel that they were getting the red carpet treatment)
- First rough draft of conference table setup
- First draft of electronics package for the show
- Rally the volunteers – they will save you from getting gray hairs
- Understand the status of everything you have ordered (if you wait until one month before the show to order, you will cause yourself undue stress and risk not getting something in time)

One to four weeks before the show

- This is the home stretch where you keep thinking that you've forgotten something



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- Stay in touch with your volunteers, keep them motivated without overtasking them
- Stay in touch with your guest speakers – make sure you have the materials they need to share with the attendees (both digitally posted on the website as well as in printable form)
- Verify everything that will go into the packets and set it up. Print the attendee materials and stuff the folders
- Prepare the badges as much as you need to (for us, it was labeling each one with a number for the raffles)
- Confirm final catering numbers with the venue
- Confirm final electronics package with the venue
- Confirm conference room setup with the venue
- Keep the excitement going with the attendees – maybe send an NL a week with a countdown
- Firm up schedule details and share with the attendees (as well as wait to the last minute to print this one, just in case)

One week up to C-Day

- The director needs to show up early, meet with the venue, show them some love, maybe bring gifts (I'm from Alaska so brought some Alaskana for my POCs that had been so helpful in the buildup to the show)
- Meet with volunteers the day before or the morning that you need them in order to shake hands – they need to be comfortable with you and you with them
- Delineate tasks and do a walkabout. All need to know the venue so they don't get lost and can answer questions from late arrivals
- Verify that the conference room setup meets your needs as early as possible, so there's time to fix things
- Time is your greatest friend – validate all conference elements as early as possible. Our room was supposed to be set up the night before, so that's when I checked on it, just to be sure.
- Show up early and dress for success. You are the person that everyone will know. Be confident, know your details, and answer questions patiently if you can't turn someone over to a volunteer (my general assistant because he saved me from getting quagmired in long conversations when stuff needed to be done)
- Check-in desk must run smoothly – one person in charge of the sheet to check off people as they check-in, and then to give out the badges, lanyards, packages, and swag. Control these or you'll run out before everyone checks in.
- Verify catering and any provided meals
- Put contact numbers into your speed dial so you can call and resolve issues like room temperature or electronics failure during the show



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- Ensure the electronics work (IT volunteer) and that you have all cables, connectors, and dongles, as well as chargers or extra batteries for the cordless microphones
- Give a great welcome aboard speech



The Wrap

Thanks for reading!

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About the Author Craig Martelle

I'm an international bestselling author. I write mostly science fiction. I live in the back of beyond, the Sub-Arctic in Alaska. We can watch the northern lights from our driveway during the six months of winter. The summers turn my property into a lush jungle where you can't even see our house from the road. Just the way we like it. It gives me lots of time to write, so I'm prolific as others may say. I have over two million words published. I'm retired from the U.S. Marine Corps as well as retired from a second gig as a business consultant, but both of those careers took me away from home a great deal. I stay at home now, write full time, and I love my job. I don't ever see doing anything else. I'm also passionate about giving back to the indie publishing community. There is a lot of great talent out there that only needs the right nudge in the right direction at the right time.

Read More from Craig Martelle

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