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**Romancing the Independent**  
Third-party planner clout is attracting a growing number of supplier suitors

by Ruth A. Hill  
*Meetings West*, December 2004

Look around today's industry landscape and you'll probably notice the sun is shining on independent—or third-party—planners, and not just on big companies like Conferon, SmithBucklin, Maritz McGettigan, and HelmsBriscoe, but on one-person operations as well.

After many years of combating misperceptions from the shadows and ripening their own professionalism, independents are getting a lot more respect and attention these days from suppliers and peers. Gone are the days when it was assumed that independents are people who operate from a spare bedroom in their house and answer the phone with a simple, if unprofessional, "hello," and suppliers are taking notice.

The reasons for the rise are varied, but 2004 has shaped up to be a year in which several dynamics have converged to produce what some might label an independent "overnight sensation" that's been in the works for years.

**Reasons for the Rise**

Several veteran independents say more hoteliers, CVBs and other suppliers are finally waking up to the clout a successful third-party planner offers them. The veterans say the new interest is being showered particularly on independents who have multiple clients in their fold and bring plenty of buying dollars to the table and efficiencies to the sales process.

"It's taken many years for suppliers to figure out that when they make a call on a sales manager of one company, they are contacting a single entity," says Charles Massey, CMP, president and CEO of West Hollywood, Calif.-based Synaxis Meetings & Events. "If they call on an independent planner like me, they are calling on a representative of 15 clients."

Carol Verret, a hotel marketing and sales consultant and educator based in Aurora, Colo., says she encourages her hotel sales trainees to look at qualified independent planners as a way to reach corporations and associations they might not otherwise know or have the time to reach.

"Independents work on relationships with their clients, so there is a level of trust and consistency there," she says. "In recent years, many hotel sales staffs have been cut back and reorganized, so maintaining relationships are difficult. Staff corporate and association planners get frustrated when they make arrangements with a hotel only to have the sales person change three times in the process. By working with an independent planner, they transfer most of that frustration onto their representative. Hoteliers need to seek out independents."

Internal organizational budget cuts, reorganizations and the economic cycle also have contributed to the lift for independents in the past few years.

"Companies realize it's more cost effective to have an outside person who is an expert in the field," Massey offers. "Independents bring expertise, diversity and creativity to the projects at hand."

Another reason the day of the independent is dawning is corporate America's penchant for trimming staff and consolidating meeting planning functions with travel management and/or purchasing departments, which is made even more appealing because of new technologies, says Linda Mansouria, CMP, CMM, president of the planning firm Make It Happen, LLC, in San Francisco.

Outsourcing is becoming more popular as staffs get stretched beyond limit or lack the experience to fulfill planning projects. Also, corporate layoffs push some experienced planners into their own business because they offer much to clients who are lean and ill-equipped with planning expertise.

"The planning industry is changing," Mansouria says, "so organizations are listening to the independent who has strategic solutions for them. Today's emphasis is on ROI, and saving money on the bottom line is critical to the planning process. This means a lot more than doing the logistics. You must be strategic and stay up with technologies and what services they can offer the organization. Those of us who have industry certifications and experience are able to think strategically, and that helps a lot when we are dealing with decision makers."

"We can walk the talk—and that is critical with procurement and others who are totally focused on the bottom line," she continues. "This is some of the added value we bring to clients as independents."

Mansouria is so dedicated to the strategic side of her profession that she is offering training classes through her new Meetings Academy educational company for other independents to help them raise their professional bar.

Kathryn Jurgensen, CMP, president of both Irvine, Calif.'s Premier Meetings, and the Alliance of Meeting Management Companies (AMMC), adds another reason for American business's growing interest in hiring independent planners. Not only are decision makers realizing they aren't staffed to handle the planning process internally, she maintains, they're also aware they can shift much of the risk and liability associated with an event to the independent whom they hire.

"I am less of a liability to a company because I am not on their payroll," Jurgensen says. "They pay just for my services and if there is a screwup I am my own entity, taking my own rap. The cost of using meetings and events to achieve objectives can be significant. I have one client who handed

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meeting planning project to an administrative person and she ended up costing the company \$250,000 because of missed deadlines, her inability to handle various situations, and general mismanagement. Another one got out of hand and the company is getting sued. If they had hired a professional, this would not have happened. I was hired as part of the cleanup crew."

### Research and Training

Firing the rise of independents' clout is MPI's FutureWatch 2004 research report, which surveyed 1,100 meeting planners and suppliers. Its findings included riveting statistics about the buying power of independents: The average annual budgets of consultants (\$6.9 million) and independent planners (\$6.5 million) now exceeds that of corporate (\$5.2 million), medical (\$3.1 million), association (\$1.4 million), and other meeting planners.

"That report demonstrated that independents' spend is huge," says Shelley T. I. Harris, CMP, president of Alexandria, Va.'s The Harris Group, which provides marketing, training and business consulting for independent planners. "Even though those stats may lump the big independent planning firms with small ones, suppliers such as national hotel sales offices and CVBs who look beyond this industry niche are stupid. Even the small firms usually have a client mix and multiple projects."

Among industry people the MPI report awakened are the International Association of Convention & Visitor Bureaus (IACVB) and Texas-based US Destination Marketing (USDMD.net). In July, the two groups announced the launch of a new Meeting Planner Partnerships program of assessment, training and partnership building. It aims to put qualified independent planners together with destination management organizations (DMOs) for mutual benefit.

"Even though there had been a buzz about third parties in the industry for some time, those MPI stats were a big catalyst for a lot of people," says USDMD.net President Jennifer Barbee. "Business is trending away from corporations and associations, and we realized an audience of independents has been neglected in terms of marketing strategies. Some larger bureaus such as Las Vegas, Orlando, Miami, and others are very mature in building relationships with independents, but smaller bureaus need help in reaching the right independents. The big guys are now reaching down for the smaller guys' business, too, so it's even more important that bureaus get good return for their efforts. Working with independents who have multiple clients can give them that."

Barbee said qualifying planners to target is part of the training her company offers bureau clients.

"We look at the amount of business the planner is booking, the region they are working, and whether they have booked a destination previously and how often, or even how many times they have considered the destination and what would make them book it."

Barbee says that relationship building with independents requires special handling, because they have been neglected for so long by the industry.

North Carolina's Raleigh CVB is one bureau seeking consult from USDMD.net to raise its profile in the meetings industry by building relationships with independents. With a new \$192 million convention center and adjacent 400-room Marriott property opening in 2008, and three other major hotels opening in 2006 (Raleigh Renaissance Hotel, The Umstead and Westin at Crabtree Valley) under construction, the CVB is seeking help with positioning and marketing.

"Our percentage of bookings with independent and corporate planners has been right at 20 percent," says Shirley Tucker, director of sales for the Raleigh CVB. "And because we have all these four- and five-star properties coming in, we want to increase that to 30 percent at least."

SMERFs, the hobby market, state government, and education meetings have been Raleigh's strong booking suit in the past. Tucker says her city's new hotels will want higher-paying groups on the docket, so the bureau is positioning for more aggressive marketing to get others to consider Raleigh because of its upgraded facilities and pivotal location within eastern North Carolina's university research and tech industry realm.

### Ongoing Challenges

Along with the new rush to romance comes increased pressures for independents. Among them: honing business management skills, an increasing number of unqualified people who want to jump on the bandwagon, and CVBs who suddenly want to lavish attention on them.

"We are always fighting perceptions," Jurgensen says. "Many just hang out a shingle and then flop. And there is always the wedding and party planner who are not who we are. They hurt us. My staff handles more than \$10 million in business a year, and I know other independents who do as much as \$50 million."

"As CVBs realize we do get paid [by our clients]—even though we've been around for 10 or 20 years—they want to treat us like Cinderella," she continues. "And they want to educate their staffs about third-party planners, party planners and independents. It's too little too late."

### Industry Suitsors and Advocates

As the industry awakens to the value independents bring to the marketplace, Jurgensen and others remain dedicated to raising professionalism among peers. She heads AMMC, an organization of 22 members that was founded in 1997, the same year its Canadian counterpart, Independent Meeting Planners Association of Canada (IMPAC), began. Both Jurgensen and Sandy Biback, CMP, CMM, president of Toronto's Imagination+Meeting Planners, say their groups began because larger meeting planner associations were not serving their needs. Biback is a past president of IMPAC and was this year's conference chair.

"We and AMMC started around 1997," Biback says, "when MPI simply was not catering to the entrepreneur planner. We have worked hard to raise our own credibility and help others do the same. Now clients regard us as specialists, not just coffee cup counters. We are more consultants than logisticians because we bring a big network of experiences to the table, giving clients resources they don't have internally."

AMMC and IMPAC are focused on networking and teaching their membership business management skills. Biback says individual members often subcontract tasks to each other for some projects while they may bid against one another for others, and that both groups are growing in membership and exhibitor and sponsor support.

"Suddenly we have big hotel chains and CVBs from major destinations wanting to get in bed with us," Biback says. "At our suppliers showcase in Toronto this year, we sold out of booths. Last year, we had 10 exhibitors; this year we had 47. There's no doubt our sector of the profession has become more respected."