

CASE STUDY

MEETING+STAGE PRODUCTION+TRADE SHOW

BankCo's Challenge

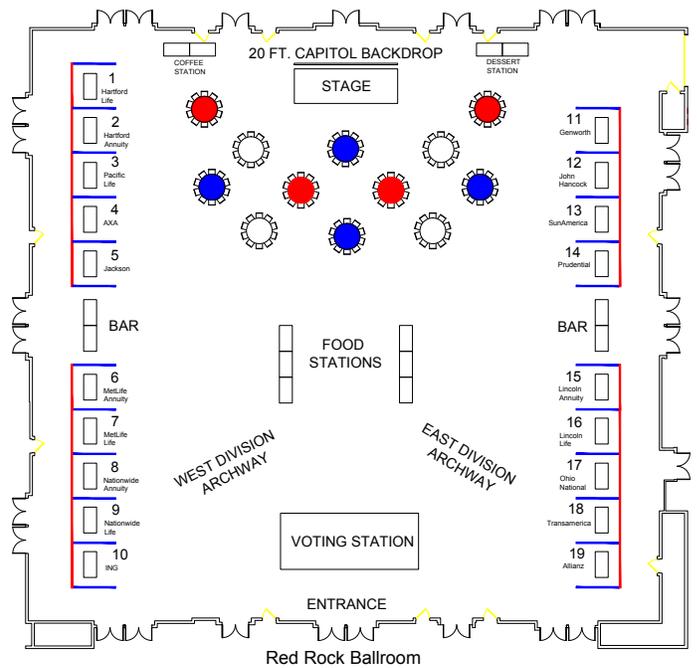
A longtime client approached us with a challenge of unusual complexity. The client, an international investment bank ("BankCo"), had a vision for increasing its sales by providing advanced training to 750 of its top financial advisors (FAs) who specialize in insurance sales.

To fund the event, BankCo asked 50 of its insurance company vendors for financial support through sponsorships. Sponsors received some or all of the following:

- › **Exhibit space at a private trade show.** Insurance vendors received booth size and placement according to sponsorship level. To attract attendees, BankCo hosted a themed evening in the exhibit hall with specialty food and beverage stations and entertainment everywhere. Games rewarded FAs for visiting multiple vendor booths. The show was open for the duration of the training event.
- › **Networking opportunities at business meetings.** Each vendor sent two or three representatives to all general sessions. These 125 vendor participants could also participate in three separate breakout session tracks, again based on sponsorship level.

BankCo invited FAs to this event based on their qualifying production levels. As a reward for their achievements, FAs earned admittance to this event for advanced training and a chance to network with BankCo senior executives, vendor executives and their peers. FA events included:

- › **Daily general session** featuring BankCo leaders (CEO, department heads and analysts) and keynote speakers such as former Secretary of State General Colin Powell and former Chairman of the Federal Reserve Alan Greenspan
- › **Breakout sessions** (FAs attended three to four each day), equating to approximately 60 total sessions available
- › A special **dinner event** at the Smithsonian Museum
- › All **air reservations and ground transportation** to and from the airport and off-site events
- › **Breakfast, lunch and dinner**, as well as continuous break stations





The challenge of administering this program included:

› **Registration**

- Establish an event website compliant with BankCo branding guidelines
- Register 900 total participants from six distinct groups of people (FAs, BankCo managers, speakers and three levels of insurance executives)
- Offer different breakout sessions and agenda for each of the six participant groups
- Collect funds from only insurance executives, and no other participants
- Send email confirmations
- Provide online reporting to include an RSVP list, a sortable participant list, an arrival/departure list for all air reservations, a breakout session list for each class, a hotel rooming list and the ability to create customized reporting on demand

› **Exhibit hall**

- CAD drawing for the space
- Coordination with each exhibitor
- Theming and décor concepting
- Installation and dismantle for all booths
- Food and beverage management
- Entertainment management

› **General session**

- CAD drawing for the space
- Stage design, construction, installation and dismantle
- Lighting and sound design
- Talent management (guest speakers)
- Show production

› **Breakout sessions**

- CAD drawing for each room
- Speaker coordination for room layout, equipment and handouts
- Equipment installation and dismantle
- Handouts management

› **Off-site event**

- Smithsonian Museum contracting
- Food and beverage management
- Entertainment management
- Ground transportation coordination

› **BankCo brand-compliant collateral**

- Websites
- Signage
- Name badges
- Printed and digital correspondence

› All **food and beverage** events

› All **ground transportation**

› All **on-location staffing** for all events

Morley's Solution

BankCo offered us the chance to partner on this event because of our unique set of competencies that satisfied their specific requirements.

- › **Morley Meetings & Incentives** provided the **site selection** that enabled BankCo to find a venue that could accommodate this event at a competitive price, an **online registration** system to manage the 700,000 fields of participant data, **meeting planning professionals** that managed every detail across all disciplines, and a **meeting production team** that produced all general sessions and breakout sessions.
- › **Morley Exhibits** provided the full resources of an **exhibition management** firm to fully satisfy all vendor fair requirements.
- › **Morley's in-house creative team** coordinated brand-compliant **art direction** and **production** across all program elements including digital and printed collateral, exhibit booths and general session presentations.

This event has been so successful that BankCo has hosted it annually for over a decade, earning Morley an opportunity to be recognized as a true supplier-partner.

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