

<b>Title:</b>	<b>Conference Planning and Attendance</b>	<b>Effective Date:</b>	<b>02/01/2017</b>
<b>Author:</b>	<b>Trish Piontek</b>	<b>Last Review Date:</b>	<b>03/17/2022</b>
<b>Location:</b>	<b>Corporate HQ</b>	<b>Last Revision Date:</b>	
<b>Functional Area:</b>	<b>Business Development/Marketing</b>		

### POLICY

On an ongoing basis, Liberty Healthcare Corporation (Liberty) attends and exhibits at relevant healthcare trade shows, conferences, and events for the purpose of advancing business development activities, networking, recruiting, and/or promoting brand awareness/thought leadership. The purpose of this Standard Operating Procedure (SOP) is to identify the key activities and functional accountabilities associated with the management of conference attendance and exhibiting activities. **Please note that this policy does not apply to conferences attended for the purpose of continuing professional education.**

### PURPOSE

Following are the key cross functional activities associated with the management of conference attendance. Designated points of accountability have been identified within each [ ].

#### **1. Conference Selection [Conference Sponsor/Conference Quarterback]**

In most circumstances, conferences or events that are considered for attendance by Liberty are identified by Business Development or Operations staff. To be considered for attendance, a conference or event should have one or more of the following goals:

- Promote awareness of a specific product line or service
- Promote Liberty as a leading provider of professional healthcare and program management services
- Recruit healthcare professionals in support of Liberty's programs
- Advance thought leadership and market share
- Facilitate the development of existing and potential customer/client relations

In identifying a conference for attendance, a determination of the business purpose and the product line to be promoted is made. In addition, the associated Conference Sponsor and Conference Quarterback are determined. The role of each is defined as follows:

**Conference Sponsor:** Responsible for identifying/supporting the business purpose, establishing budgetary guidelines, determining those employees attending, and gaining attendance approval from the President. A template to assist with the development of a conference budget has been included in **Appendix A – Conference Cost Matrix**.

**Conference Quarterback:** Responsible for scheduling the planning and debrief meetings with key stakeholders, selecting booth location (if applicable), completing conference questionnaire, serving as on-site point of contact, and reporting against defined conference attendance/sales goals.

#### **2. Conference Database Management [Marketing Coordinator]**

The Marketing Coordinator maintains a MS Access-based database to record key information (i.e. conference name, dates, location, quarterback, sponsor) related to conferences that Liberty has attended, will attend, or is considering attending. The database serves as a repository of information associated with the planning of future conferences, as well as memorializing those previously attended.

Reports detailing conferences by month, projected at least 12 months into the future, are generated by the Marketing Coordinator and reviewed bi-annually by key stakeholders to ensure record accuracy and awareness for planning purposes.

### **3. Conference Planning Meeting(s) [Conference Quarterback]**

At least four (4) months in advance of a planned, and approved conference, the Marketing Coordinator will alert the Conference Quarterback of the need to schedule the preliminary and any subsequent planning meetings. The purpose of this meeting is to review and discuss conference related items, including but not limited to, exhibit and attendee registration, printed material needs, promotional items, targets, pre-event marketing, etc. The **Conference Attendance Checklist (Appendix B)** will serve to facilitate this meeting and will function as a preliminary and final checklist for the event. The Conference Attendance Checklist will be pre-populated by the Marketing Coordinator with known conference information and sent to the Conference Quarterback for review and completion prior to the initial planning meeting. A final, and approved checklist will be attached to the appropriate record in the conference database.

### **4. Exhibit and Attendee Registration [Marketing Coordinator]**

The Marketing Coordinator is responsible for registering Liberty as an exhibitor, as well as conference attendees, if the exhibiting fee includes attendee registrations. Should that not be the case, individual attendees will complete their own registrations. Conference attendees are also responsible for making their individual travel arrangements (transportation, hotel, etc.). The Marketing Coordinator is responsible for communicating conference registration confirmations with all attendees.

### **5. Post Conference Activities [Conference Quarterback/Marketing Coordinator]**

Post conference activities shall be conducted to assess the effectiveness of the conference in meeting its goals and objectives. These activities include a post conference debrief, updating of the database, and submitting travel expense reports.

#### **5a. Debrief Meeting [Conference Quarterback]**

Following the conference, a debriefing is scheduled, and a summary of events is completed by the Conference Quarterback and provided to the Conference Sponsor. The goal of this debrief is to enable the organization to more effectively evaluate outcomes relative to goals and objectives, assess return on investment, and determine whether to attend and/or exhibit at future conferences.

Key questions to be asked include:

1. Was the location of the exhibit space (if applicable) favorable?
2. Were the right quantities of printed materials provided?
3. Was the messaging appropriate and supportive of our goals?
4. How was attendance/booth traffic?
5. Were the promotional items appropriate?
6. What was effective overall? What could be changed?
7. Leads generated? Contacts made?
8. Presentation/workshop effectiveness?
9. If applicable, how effective was the pre-event marketing?

#### **5b. Conference Database/CRM Updating [Marketing Coordinator]**

Following conference attendance, the database will be updated to accurately reflect all of the conference details. In addition, notes from the conference debrief will be uploaded and the event will be memorialized for future reference. In addition, CRM shall be updated with all appropriate leads/opportunities generated as a result of the conference or event.

**Approved By:** \_\_\_\_\_

## Revision History

Version	Date	Author	Summary of Changes
#1	02/01/2017	Trish Piontek	Policy Created
#2	03/25/2021	Trish Piontek	Policy reviewed with no changes made
#3	03/17/2022	Trish Piontek	Policy reviewed with no changes made