

CROSSWALK OF UPDATES TO CMP-IS BASED ON 2016 JOB ANALYSIS STUDY

As the premier certification for Meeting and Event Professionals, the Certified Meeting Professional (CMP) program represents current practices and skills required for competency in the profession. As such, the CMP must review its body of knowledge every five (5) years through a Job Analysis Study to ensure the content of the exam remains relevant. The resulting document is the CMP International Standards (CMP-IS) and is the basis of the CMP exam content.

In 2016, CIC conducted a Job Analysis Study and the updates to the CMP-IS will be incorporated into the CMP exam starting with the May 5-14, 2017 testing window.

The following pages are a “crosswalk” of the changes to the standards. Overall, changes were minimal:

- In some cases, Skills and/or Sub Skills were removed because they were redundant. For instance, the previous Sub Skill 3.04 “Evaluate Effectiveness of Risk Management Plan” in Project Management removed was removed because it was already covered in the Risk Management domain.
- Many times the language of Skills and Sub Skills was modified to be more concise but the meaning remained the same.
- All “Common Knowledge” statements were removed. This information was often redundant from one domain to the next and was not included on exam.
- Domain J: Professionalism was removed because the Job Analysis Panel felt that this knowledge was already covered in the Code of Ethics that all CMPs and potential CMPs must sign and adhere to.
- Terminology: “Ability (Know How to)” changed to “Skills” and “Sub Skills”

WHAT DOES THIS MEAN FOR TEST TAKERS?

What does this mean for test takers during the May 2017 exam and subsequent exams? Really, just a change in the emphasis or numbers of items (exam questions) in some domains, and the elimination of Domain J items. While there are a few new skill statements, addition of items to the CMP exam occurs over time. The writing of new items, whether for a new skill or for established ones, goes through a rigorous process before they are included as live items on an exam. That includes subject matter expert (CMP) writing, psychometric re-writes, Item Review panel analysis, confirmation of references in study texts, pretesting, more statistical analysis, more committee review and, finally, live testing. Therefore, candidates and study groups/leaders should not be concerned or expecting major changes with this iteration of the CMP-IS.

OVERALL CHANGES:

Category	Previous CMP-IS	New CMP-IS	Percentage change
Domains	10	9	1%
Skills	30	27	1%
Sub Skills	106	82	23%

DOMAIN PERCENTAGE CHANGES:

Domain	PREVIOUS CMP-IS	NEW CMP-IS
Strategic Planning	16%	10%
Project Management	15%	6%
Risk Management	8%	5%
Financial Management	10%	11%
Human Resources	3%	4%
Stakeholder Management	8%	4%
Meeting or Event Management	16%	34%
Site Management	12%	14%
Marketing	11%	12%
Professionalism	2%	0%

You may download a copy of the current CMP International Standards from the CIC [website](#). The Crosswalk of the changes to the previous version of the CMP-IS are below.

Convention Industry Council
February 2017

CMP-IS Update with Crosswalk

Updated CMP International Standards	Previous CMP-IS
Domain A: Strategic Planning	
Skill 1: Create Strategic Plan for Meeting or Event	Skill 1
Sub Skill 1.1: Develop event goals and objectives to align with organizational strategy.	1.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Working with stakeholders, create goal statements to specify how meeting or event will achieve its mission	
b. Working with stakeholders, establish objectives to specify actions, time frames, and performance measurements needed to achieve goals	
c. Working with stakeholders, align mission statement, goals, and objectives of meeting or event and organization/stakeholders	
d. Working with stakeholders, identify and manage diversity and cross-cultural concerns (e.g., holidays, group preferences, accessibility compliance)	
e. Working with stakeholders, determine sustainability objectives (e.g., financial, environmental, social)	
f. Working with stakeholders, identify financial resources that may be available	
g. Working with stakeholders, determine target date(s) and markets	
Sub Skill 1.2: Complete needs assessment to determine feasibility of the meeting or event.	1.02
Knowledge of:	
a. Research methods suitable to ascertain viability of meeting or event	
b. Legal and regulatory requirements	
Skill in:	
a. Determining short-, medium- and long-term economic and social impacts on host community (e.g., focus on impact of limited events).	New but included several “ability to” statements from original CMP-IS
b. Developing evaluation process to capture information about potential attendees, costs and benefits, and financial resources.	

Sub Skill 1.3: Identify meeting or event requirements to align with goals and objectives.	1.03
Knowledge of:	
a. Tools or resources available for meeting or event planning (e.g., technology)	
Skill in:	
a. Identifying requirements based on scope of meeting or event, including planning cycle, sponsorship opportunities, additional sources of resources, meeting or event evaluation, administrative needs, leadership and management, logistics and operations structure, cross-cultural needs, marketing, human resources (e.g., number of people, wage rates), meeting or event timing, location and size, data flow, public relations, systems to track progress	
Sub Skill 1.4: Complete a financial analysis and develop a financial summary.	1.04
Knowledge of:	
a. Tools or resources for financial planning	
b. World monetary situations	
Skill in:	
a. Compiling financial information using financial results, current financial position, sources and applications for funding, and current balance sheet details (e.g., assets, liabilities, equity, statement of operational costs, cash flow statements, projected closing balance sheets, break-even analysis, projected return on investment, applicable taxes or levies into a complete financial report)	
Sub Skill 1.5: Monitor and measure event benchmarks to align with the strategic plan.	1.05
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Comparing meeting or event progress to mission statement, goals, and objectives	
b. Monitoring cash flow to determine financial standing to date	
c. Managing financial resources	
d. Analyzing all data available when evaluating a need for change	
e. Recording change control details (e.g., date, rationale, implementation plan to support the	

need for change to event so that support is obtained for changes made)	
Skill 2: Develop Sustainability Plan for Meeting or Event	
Sub Skill 2.1: Implement Sustainability Plan	2.01
Knowledge of:	
a. Substantiality standards for meeting or event (e.g., ISO 20121, BS8901, APEX/ASTM standards; Global Reporting Initiative (GRI))	
Skill in:	
a. Considering potential short- and long-term social and environmental impact of meeting or event	
Sub Skill 2.2: Demonstrate Environmental Responsibility	2.02
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements	
a. Implementing conservation practices (e.g., using recyclable products, reducing energy use and water consumption, minimizing noise and light pollution)	
b. Selecting strategies to create positive outcomes and mitigate negative impacts of meeting or event on community	
Skill 3: Develop Business Continuity or Long-Term Viability Plan of Meeting or Event	Skill 3
Sub Skill 3.1: Develop evaluation plan based on event goals and objectives to align with organizational strategy.	3.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Defining return on investment objectives/expected outcomes (e.g., efficiency, effectiveness, accountability, justifying investments)	
b. Determining what data will be collected (e.g., costs, post-event attendee feedback)	
c. Developing a business case for long-term sustainability	
Sub Skill 3.2: Collect and analyze meeting or event data using the evaluation plan to measure return on investment.	3.02

Knowledge of:	
a. Quantitative and qualitative data	
Skill in:	
a. Collecting data (e.g., evaluation-related, attendance, financial)	
b. Analyzing data	
c. Preparing and reporting data	
Sub Skill 3.3: Evaluate meeting or event data to measure the critical success factors against the goals and objectives.	3.03
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Reviewing critical success factors for meeting or event (e.g., benchmarks)	
b. Implementing evaluation/audit procedures as scheduled (e.g., collecting and analyzing information, verifying validity and reliability of information, identifying and reporting any difficulties accessing information, identifying and addressing irregularities)	
c. Evaluating information (e.g., identify reasons for success/failure and key lessons for future meetings or events)	
d. Developing reports (e.g., detailing information used and information sources, explaining how information has been analyzed, drawing conclusions and making recommendations based on evidence, using best format for organization, key personnel, and stakeholders)	
e. Following integrated communication plan for distribution of evaluation/audit report and confidentiality guidelines	
f. Debriefing internal and external stakeholders	3.03
Sub Skill 3.04: Evaluate Effectiveness of Risk Management Plan	Sub Skill 3.04 removed here because it is covered in Risk Management Domain.
Domain B: Project Management	
Skill 4: Plan Meeting or Event Project	
Sub Skill 4.1: Develop project plan based on meeting needs to align with goals and objectives.	4.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	

a. Reviewing available historical data (e.g., previous project plans) in order to identify strengths and weaknesses, review goals and objectives, and compare results to goals and objectives	
b. Specifying the actions, time frames, and performance measurements needed to achieve objectives	
c. Identifying resources required and available (e.g., financial, material, staff)	
d. Engaging relevant stakeholders in planning process (e.g., including attendees, conducting exploratory research, seeking peer reviews)	
Sub Skill 4.02 (removed): Develop quality standards, policies and procedures. Sub Skill 4.03 (moved): Develop theme for meeting or event. Sub Skill 4.04 (moved): Develop procurement plan (Acquisition of goods and services) Sub Skill 4.05 (moved): Establish Milestones and critical path Sub Skill 4.06 (moved): Develop integrated Communication Plan Sub Skill 4.07 (moved): Develop Evaluation/Audit procedures	Original Sub Skills 4.03, 4.04, 4.05, 4.06, 4.07 moved to Meeting & Event Design Domain, Skill 12 Sub Skill 4.02 removed
Skill 5: Manage Meeting or Event Project	Skill 5
Sub Skill 5.1: Manage the critical path to complete the project plan.	5.01
Knowledge of:	
a. Critical paths and review schedules	
Skill in:	
a. Identifying specific tasks and projects required to achieve mission, goals, and objectives of meeting or event	
b. Prioritizing tasks and projects	
c. Determining timelines and critical dates	
d. Creating meeting or event briefs outlining relevant information for specific stakeholders (e.g., committee members, suppliers, agencies, project team)	
e. Assigning tasks to specific groups or individuals based on skills or areas of expertise	
f. Scheduling regular review of critical path (e.g., assessing variations between estimated and actual time, analyzing resource deficiencies and overages)	

g. Taking corrective action based on results of review	
h. Keeping key personnel informed of progress and changes	
Sub Skill 5.2: Develop and manage contract management plan to meet stakeholder expectations and meeting requirements.	5.02
Knowledge of:	
a. Principles of negotiation, stages of negotiating process, and negotiation techniques	
b. Components of legal contracts	
c. Meeting or event and organization's requirements	
Skill in:	
a. Identifying requirements for contracts (e.g., preparing specifications)	
b. Communicating request for proposal (RFP) processes to potential suppliers of goods and services	
c. Evaluating proposals against criteria	
d. Negotiating contracts (e.g., striving for beneficial outcomes for all parties involved, determining what is negotiable and non-negotiable, explaining organization's position and viewpoint, listening to and validating other parties' positions and viewpoints, discussing options, agreeing on most viable options, deciding on sources of information for evaluation)	
e. Consulting legal opinion, if needed	
f. Integrating contractual obligations into meeting or event's critical path	
g. Maintaining productive relationship with contractors (e.g., monitoring progress on a regular basis to determine that the organization and contractors are fulfilling obligations, agreeing on action to rectify non-compliance, dealing with breaches of contract within acceptable time frame)	
h. Assessing contractors' performance to identify strengths and weaknesses	
i. Monitoring contractors' expenditures against contract	
j. Comparing organization's performance against contract	
Sub Skill 5.3: Execute project management plan to meet goals and objectives.	5.03

Knowledge of:	
a. Critical paths and review schedules	
b. On-site resources and personnel	
c. On-site meeting or event management	
d. Integrated communication plans	
Skill in:	
a. Following event specifications guide for meeting or event	
b. Maintaining flow/sequence of activities during meeting or event	
c. Determining that all resources, personnel, and supports are in place and ready	
d. Ensuring that all personnel are briefed (e.g., submitting event specifications guide to key stakeholders, as appropriate)	
e. Providing authorizations for elements of meeting or event to take place	
f. Receiving and distributing funding	
g. Overseeing the work of key personnel and other stakeholders throughout meeting or event (e.g., following integrated communications plan)	
h. Implementing risk management techniques and strategies to minimize disruption to participants and to deal with problems that arise	
i. Keeping key personnel informed of progress and changes	
j. Maintaining records	
Domain C: Risk Management	
Skill 5: Manage Risk Management Plan	Skill 6
Sub Skill 6.1: Identify risks by reviewing current data and event history to address potential risks.	6.01
Knowledge of:	
a. Research methods	
b. Risk management	
Skill in:	
a. Reviewing meeting or event plan (e.g., type of meeting or event, location of meeting or event, time of year, time of day, duration of meeting or event, profile of attendees, number of attendees)	
b. Reviewing any investigations of previous incidents	
c. Determining scope and nature of legal, ethical, and regulatory obligations: considering range of legal and regulatory	

issues (e.g., contracts); determining jurisdictions responsible (e.g., national and local governments); identifying legislation, codes, ordinances, mandates, and regulations applicable to meeting or event and its operations; identifying authorities, agencies, or governing bodies responsible; determining process for acquiring authorizations	
d. Consulting with other relevant individuals (e.g., colleagues, clients, contractors, performers, legal personnel, security personnel, venues)	
e. Evaluating venue and geographic location for potential hazards, threats, vulnerabilities, or other risks	
f. Assessing the need for specialist advice or assistance in addressing legal, regulatory, and jurisdictional requirements	
g. Conducting risk assessment	
Sub Skill 6.2: Apply industry best practices to analyze risks.	6.02
Knowledge of:	
a. Authorities, agencies, and governing bodies that preside over specific activities within a jurisdiction	
Skill in:	
a. Determining what is exposed to damage, loss, or liability (e.g., property, persons, cash, reputation, environment); what could cause damage, loss, or liability; who could suffer damage, loss, or liability; and when damage, loss, or liability might occur	
b. Assessing probability of occurrence, severity of consequences (e.g., extent of impact, financial consequences, maximum possible loss or liability)	
c. Prioritizing risks, considering organization’s tolerance for risk and jurisdiction’s mandates regarding risk, and mitigating or transferring risk	
d. Considering effectiveness of risk management techniques	
Sub Skill 6.3: Use risk analysis to develop a risk management and implementation plan.	6.03
Knowledge of:	
a. Organizational culture	
b. Location situational analysis	

Skill in:	
a. Evaluating options to meet legal requirements and mitigate risks (e.g., seeking advice from regulatory authorities and specialists, putting supports in place to minimize risks)	
b. Identifying health and safety requirements and selecting available options to meet requirements	
c. Preparing risk management plan, including chain of command, emergency and control procedures, spokesperson, and implementation strategies (e.g., decision-making authority, resource requirements, coordination requirements)	
d. Implementing plan to manage risks	
e. Communicating plan and procedures to emergency services, media, suppliers, senior management, and staff	
f. Assessing risk management plan on an ongoing basis	
g. Complying with regulations	
h. Consulting experts	
i. Obtaining insurance, reviewing insurance coverage needs and levels periodically, and updating insurance coverage as needed	
Sub Skill 6.4: Develop and implement emergency response plan to manage resources in emergency situations.	6.04
Knowledge of:	
a. Decision-making authority processes	
Skill in:	
a. Conducting a threat assessment to identify potential threats, hazards, or emergencies (e.g., earthquake, disease outbreak, hazardous material spill, utility failure, bomb threat, structure collapse)	
b. Performing a capability assessment to determine resources available to respond to an emergency (e.g., medical, fire, rescue, security)	
c. Conferring with authorities to determine requirements and appropriate emergency procedures, including access, egress, and locations for emergency services; exit route configuration for site evacuation; on-site medical services required (e.g., number and locations of first-aid stations and emergency	

medical technicians); internal and external communication systems; roles; responsibilities; lines of authority; and delegation of duties	
d. Implementing emergency response plans and communication procedures	
e. Executing contingency and business continuity plans as appropriate	
Sub Skill 6.5: Arrange security according to emergency response plan to reduce impact.	6.05
Knowledge of:	
a. Risk analysis	
b. Types of security alternatives	
Skill in:	
a. Determining needs, including considering type of meeting or event, hours of operation, type of venue, types of activities (e.g., serving alcohol), physical activities, number and nature of attendees and VIPs, number and nature of entrances and exits, traffic patterns, insurance requirements, and type of property issues (e.g., theft)	
b. Complying with applicable jurisdictions	
c. Informing authorities (e.g., fire, police) of meeting or event time, dates, and activities	
d. Arranging for security staff and facilities, training for staff and volunteers, and accreditation for security staff	
e. Attaining certificates of insurance from security suppliers (e.g., obtaining additional coverage), as needed	
f. Detailing security procedures for emergency situations (e.g., crowd control, protesters and/or picket lines, site evacuation, natural disaster, terrorist activities)	
g. Implementing internal and external security communication systems	
h. Establishing system for reporting and recording incidents	
Domain D: Financial Management	
Skill 7: Manage Event Funding and Financial Resources (Note: organizations can be for-profit or not-for-profit)	Skill 7
Sub Skill 7.1: Develop budgeting processes for funding resource management to fulfill financial goals.	7.01 -- New title (was Manage Sponsorship and Donor Process)
Knowledge of:	

The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Establishing sponsorship programs: identifying financial or in-kind values, defining benefits, and estimating costs for providing benefits	
b. Obtaining support of key stakeholders for proposed sponsorship arrangements	
c. Seeking legal opinion, as needed	
d. Identifying potential sponsors and donors, considering: compatibility with meeting or event, exclusivity, income or cost-avoidance goals, and advertising and budget limitations (to find sponsors)	
e. Producing sponsor and donor benefit packages or proposals containing overview and history of meeting or event, corporate identity to be presented (e.g., use of logos), value for sponsorship, letter of proposal, audience demographics, return-on-investment measures and opportunities, sponsorship benefits and limitations, and pre-event/meeting sponsorship restrictions	
f. Distributing sponsor and donor benefit packages and proposals to potential sponsors	
g. Contacting potential sponsors and donors (e.g., primary decision-maker or person of influence), determining type of support available (e.g., cash, discounts, products), establishing relationships with sponsors' creative agencies, negotiating sponsor commitment (e.g., distribution, product sales), and conducting set-up, tear-down, and sampling	
h. Considering how sponsors may complement or conflict with each other	
i. Preparing contracts for committed sponsors, outlining: details of meeting or event, responsibilities of both parties (e.g., liabilities), personnel, entertainment, financial obligations, release forms and waivers, policy regarding meeting or event cancellation, and insurance requirements	
j. Maintaining relationships with sponsors and donors (e.g., providing regular updates)	

k. Managing contractual fulfillment and developing fulfillment reports (e.g., delivery of benefits)	
l. Following up (e.g., evaluating sponsor and donor involvement, evaluating return on investment from sponsors' points of view)	
m. Coordinating approach for soliciting potential donors and sponsors	
Sub Skill 7.02: Manage Grant Funding process	Sub Skill 7.02 removed
Sub Skill 7.2: Develop and manage the registration process through a defined system to reach established goals and targets.	7.03
Knowledge of:	
a. Setting financial targets for registration	
b. Previous registration lists for meeting or event	
c. Registration systems (e.g., internal/external)	
Skill in:	
a. Identifying potential attendees and types of attendees	
b. Communicating attendee benefits in pre-registration information packet containing: overview and history of meeting or event, location of and cost to attend meeting or event, identity of meeting or event sponsor, educational value of attending, meeting or event agenda, criteria for acceptance of registration (if applicable), and additional programming offerings (e.g., tours, spouse programming, hospitality)	
c. Identifying potential supplier partners (e.g., application service provider, full-service registration contractor)	
Sub Skill 7.3: Develop and manage exhibit sales process using current year space allocation to reach established goals and targets.	7.04
Knowledge of:	
a. Exhibit sales goals/targets including on-site and post-meeting or event deliverables	
b. Protocols (e.g., methods of communication)	
c. Security and safety regulations, restrictions, and constraints (e.g., facility, organization, government)	
d. Public relations and marketing plans	
Skill in:	
a. Establishing exhibit rates	
b. Identifying potential exhibitors considering compatibility with meeting or event	

c. Producing exhibitor benefit packages (prospectus) containing: overview and history of meeting or event, value for participation, letter of solicitation, audience demographics, ROI measures and opportunities, and pre- and post-event/meeting activity restrictions	
d. Distributing benefit packages to potential exhibitors	NEW
e. Completing contract negotiations with exhibitors	NEW
f. Establishing positive relations with exhibitors (e.g., recognition program, feedback from exhibitors)	
Sub Skill 7.4: Manage additional revenue sources through research and analysis to reach established goals and targets.	7.05
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Purchasing advertising	
b. Merchandising	
c. Negotiating and setting commission rates	
d. Determining and setting royalty rates	
Skill 8: Manage budget	Skill 8
Sub Skill 8.1: Develop budget using accepted accounting principles to align with the goals, objectives, and financial parameters of the event.	8.01
Knowledge of:	
a. Scope of meeting or event	
b. Meeting or event objectives	
c. Type of insurance	
d. Organization’s cash flow	
e. Fluctuations in currency and taxes	
Skill in:	
a. Defining budget format and categories	
b. Identifying, accessing, and interpreting data and data sources needed for budget preparation (e.g., previous budgets, audits)	
c. Analyzing internal and external factors for potential impacts on budget (e.g., new legislation, market trends)	
d. Determining potential sources of revenue, including grants, sponsorships, sales (e.g., ticket sales, souvenirs), registration, advertising, and exhibitor fees	

e. Allocating budget amounts for meeting or event activities (direct/indirect costs), including programming, production, marketing, administration, human resources (e.g., volunteers, staff), transportation, food and beverage, accommodations, shipping costs, insurance, taxes, and gratuities	
f. Establishing contingency plan and funds	
g. Using existing chart of accounts by breaking down into weekly or monthly budgets or detailing projected cash flow	
h. Specifying fixed and variable costs	
i. Complying with budget control guidelines (e.g., payment policies and procedures), cost controls, and deposit policies and procedures for cash, credit cards, and payments	
j. Scheduling regular budget reviews	
k. Submitting budget for approval, if necessary, to senior management, partners, or organization, and revising budget as required	
l. Communicating budget decisions to those affected	
Sub Skill 8.2: Establish pricing (e.g., registration, sponsorships, exhibits) based on market analysis to meet financial targets and goals.	8.02
Knowledge of:	
a. Profit requirements and desired profit margin	
b. Cost of sales	
c. Customer profiles	
d. Annual consumer price index trends	
e. Currency and credit card procedures for multinational meetings or events	
f. Credit card handling costs	
g. Currency fluctuations	
h. Tax structures in host location	
i. Perceived market value of products and services	
Skill in:	
a. Collecting and analyzing information related to current market conditions	
b. Calculating fixed and variable costs	
c. Establishing pricing structure (e.g., percentage increase or cost plus, member discount rates)	
Sub Skill 8.3: Monitor and revise budget using established audit procedures to identify potential adjustments.	8.03
Knowledge of:	

a. Reporting and audit procedures	
b. Performance indicators	
Skill in:	
a. Adhering to budget control guidelines and responding to variances	
b. Monitoring revenues and expenses within established time frames	
c. Comparing budgeted amounts to actual amounts	
d. Identifying variances between budgeted and actual figures, including: determining cause(s), identifying impacts, and responding accordingly (e.g., revising activities, reallocating funds, communicating information and decisions to those affected)	
e. Defining opportunities for improved budget performance: proactively researching new suppliers and revenue streams, discussing desired budgetary outcomes with colleagues, and presenting recommendations to appropriate individuals or departments	
f. Obtaining approval for amended budget	
g. Pursuing ideas for increasing income or reducing expenditures	
h. Communicating budget performance to key personnel	
i. Completing financial reports and delivering to stakeholders	
Sub Skill 8.04: Revise Budget	Sub Skill 8.04 was combined with 8.03
Skill 9: Manage Monetary Transactions	Skill 9
Sub Skill 9.1 Establish monetary transactions procedures to comply with event or organization financial guidelines.	9.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Communicating policies and procedures to staff and volunteers	
b. Coordinating monetary transactions, including: setting up central cash office, establishing record-keeping systems (e.g., receipts), setting up cash collection and deposit systems, arranging for security and audit systems, processing credit cards	

Sub Skill 9.2: Manage monetary transactions process to confirm compliance with event or organization financial guidelines.	9.02
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Reviewing security procedures	
b. Monitoring revenues and expenses	
c. Monitoring cash handling procedures	
d. Monitoring audit documentation	
e. Revising procedures as needed	
Domain E: Human Resources	
Skill 10: Recruit Staff and Volunteers	Skill 10
Sub Skill 10.1: Assess staffing needs by reviewing program activities to determine requirements and selection criteria.	10.01
Knowledge of:	
a. Local employment conditions	
b. Local labor laws	
c. Skill sets required for specific positions	
d. Local terms and conditions applied to volunteers, where applicable	
Skill in:	
a. Seeking input from current staff about duties and responsibilities	
b. Reviewing documentation (e.g., organizational chart)	
c. Documenting job requirements, (e.g., job title, summary of duties, required qualifications and skill sets, level of responsibility, authority and accountability, wages and/or benefits, days/hours of work or time commitment required, grooming and dress codes, option for job to be conducted outside of office or “virtually”)	
Sub Skill 10.2: Develop a staff and volunteer recruitment plan to fulfill requirements.	10.02
Knowledge of:	
a. Costs associated with recruitment	
b. Budget restrictions	
c. Sources for staff and volunteers	
d. Background checks	
Skill in:	
a. Determining best methods for recruiting target group (e.g., promoting opportunities through local media, promoting within	

organization, seeking referrals through networking, participating in work education programs, reviewing applications, contacting or hiring employment agency)	
b. Ensuring that process is fair, consistent, and effective	
c. Ensuring that recruitment information is clear and accurate	
Sub Skill 10.03: Select best candidates and offer positions	Sub Skill 10.03 removed
Skill 11: Train Staff and Volunteers	Skill 11
Sub Skill 11.1: Provide orientation and training to staff and volunteers to align with company and event goals and objectives	11.01 -- Sub skills 11.01 and 11.02 combined
Knowledge of:	
a. Orientation and training procedures	
b. Company expectations and guidelines	
Skill in:	
a. Providing training and orientation to staff	
b. Communicating expectations and guidelines to staff	NEW
Skill 12: Manage Workforce Relations	Skill 12 "Manage Workforce Relations" was removed. This Skill was covered in Skill 11 (now Skill 10)
Domain F: Stakeholder Management	
Skill 12: Manage Stakeholder Relationships	Skill 13
Sub Skill 12.1: Perform stakeholder analysis to align expectations with goals and objectives.	13.01
Knowledge of:	
a. Mission statement, goals, and objectives of meeting or event and organization	
b. Meeting or event details (e.g., features, critical path)	
c. Appropriate protocols and local customs (e.g., dress code, VIP treatment)	
Skill in:	
a. Identifying internal and external stakeholders (e.g., clients, officials, sponsors, participants, providers, exhibitors)	
b. Defining stakeholder interest, issues, and priorities	
c. Determining opportunities and challenges that each stakeholder presents	
Sub Skill 12.2: Manage stakeholder activities to meet expectations.	13.02
Knowledge of:	

a. Applicable legislation (e.g., liquor laws, professional codes)	
b. Appropriate protocols and local customs (e.g., dress code, VIP treatment)	
Skill in:	
a. Recognizing and integrating varied interests and goals of stakeholders	
b. Determining activities that meet the needs of stakeholders	
c. Acknowledging and monitoring stakeholder concerns and capabilities	
d. Following appropriate protocols when communicating with stakeholders	
e. Communicating appropriate protocols to stakeholders	
f. Developing schedule of activities	
g. Establishing relationships with all stakeholders	
Sub Skill 12.3: Communicate event goals and objectives to manage stakeholder relationships.	13.03
Knowledge of:	
a. Codes of practice and ethics including customer and consumer rights	
b. Legal and regulatory requirements	
c. Stakeholder satisfaction survey methods	
Skill in:	
a. Determining that staff and volunteers know stakeholder expectations	
b. Making sure staff know their own roles and responsibilities for meeting stakeholder expectations	
c. Empowering staff and volunteers to deliver good stakeholder service	
d. Confirming that clear and effective conflict resolution processes are in place	
e. Communicating acceptable day-to-day behavior that matches organization's values	
f. Recognizing contribution of staff who work with stakeholders	
g. Establishing system to evaluate/monitor stakeholder satisfaction and improve service	
Domain G: Meeting or Event Design	
Skill 13: Develop Program	Skill 14
Sub Skill 13.1: Develop theme for meeting or event.	Was Sub Skill 4.03 from Project Management Domain
Knowledge of:	

a. Range of creative, promotional, technical, and operational options	
b. Key stakeholders	
c. Budget parameters	
d. Target market(s)	
e. Marketing and public relations options	
f. Destination branding and brand management	
g. Program objectives	
h. Cross-cultural elements	
Skill in:	
a. Determining stakeholder expectations (e.g., researching target market(s), analyzing post-event reports, researching attendee expectations)	
b. Generating ideas (e.g., brainstorming, networking)	
c. Conceiving a meeting or event theme that will complement or integrate with organization's marketing and brand strategy	
d. Engaging expertise (e.g., marketing firm consultant)	
e. Conceptualizing themes, including: identifying core concepts, topics, or messages; creating appealing images (e.g., logo); identifying means to integrate themes into all aspects of meeting or event; involving stakeholders (e.g., considering requirements of sponsors, considering cultural environment and norms); and identifying destination attributes	
f. Integrating branding and theme imagery into aspects of meeting or event experiences	
Sub Skill 13.2: Develop procurement strategy for the acquisition of goods and services in accordance with the project plan.	Was Sub Skill 4.04
Knowledge of:	
a. How to conduct a cost/benefit analysis	
b. Request-for-proposal process	
c. Organizational strategies and policies	
Skill in:	
a. Evaluating past patterns of resource use, trends, and developments	
b. Identifying need for supplementary products and services, including required range (types of services) and quantity	
c. Researching options available to meet needs that minimize risk	

d. Assessing costs and benefits for options available	
e. Selecting best options/strategies (e.g., purchasing or renting equipment, issuing a request for proposals for services)	
f. Adjusting activities if products/services are not available	
g. Recording best options/strategies and financial information	
h. Evaluating and determining best method for securing services (e.g., housing, accommodations, transportation, audiovisual)	
Sub Skill 13.3: Analyze the project plan to determine the critical path.	Was Sub Skill 4.05 from Project Management Domain
Knowledge of:	
a. Tasks and phases (stages) required for meeting or event (e.g., pre-, during, post-)	
b. Interdependence of tasks and phases (stages)	
c. Schedule development and revision	
d. Project planning and management	
Skill in:	
a. Identifying specific, realistic, measurable, and achievable tasks and phases required to achieve meeting or event objectives	
b. Setting and prioritizing goals and objectives	
c. Determining links, dependencies, timelines, and critical dates	
d. Estimating durations of tasks	
e. Assigning tasks to specific committees or individuals	
f. Scheduling regular review of critical path	
g. Identifying potential risks	
h. Managing critical paths	
Sub Skill 13.4: Develop integrated communications plan to align with goals and objectives.	Was Sub Skill 4.06 from Project Management Domain
Knowledge of:	
a. Applicable legislation, regulations, customs, and internal policies concerning communication issues (e.g., intellectual rights, privacy, proprietary information, cultural/political)	
b. Organizational structure	
c. Strategic plan and goals	
d. Differences (e.g., priorities, views) of respective stakeholders (e.g., intradepartmental, project team, external,	

individuals with special needs or language differences)	
e. Marketing, public relations, and communications plan	
f. Policies related to system security	
Skill in:	
a. Designing meeting or event communication plan that will complement or integrate with organization’s communication plan, internal organization’s plan, and external stakeholders’ plan	
b. Establishing standardized documentation and document design procedures	
c. Using information retrieval systems	
d. Creating information collection policies, procedures, and structures	
e. Constructing information distribution policies, procedures, and structures (e.g., who gets the information)	
f. Generating policies and procedures to maintain system security and integrity (e.g., developing privacy policy, developing accessibility policy)	
g. Setting up data reporting and monitoring systems	
h. Establishing record-keeping and filing systems	
i. Developing information preservation and archiving policies and procedures	
j. Creating plan for site communication (e.g., tools to be used for site communication, protocols, emergency contacts, risk management plan, on-site logistics)	
k. Researching and selecting technology for site communication	
l. Analyzing and selecting different technologies for storage (e.g., database, paper filing system)	
Sub Skill 13.5: Develop evaluation procedures.	Was Sub Skill 4.07 from Project Management Domain
Knowledge of:	
a. Evaluation processes and procedures	
b. Basic accounting principles that are global in nature	
c. How to set measurable objectives	
d. Meeting- or event-related elements or activities that may be evaluated/audited before, during, and after meeting or event	

e. Stakeholder requirements	
Skill in:	
a. Defining purpose of evaluation	
b. Identifying areas to be evaluated (e.g., mission, goals, program, sponsorship program, attendance, finances)	
c. Determining critical success factors for meeting or event (e.g., benchmarks)	
d. Identifying evaluation/audit procedures, including: determining who will conduct evaluation/audit and identifying information required for evaluation (e.g., plans, budgets, variance reports, progress reports)	
e. Selecting date(s) for implementation	
f. Establishing reporting process	
Sub Skill 13.6: Identify program components using a variety of data to determine that the program is inclusive.	14.01
Knowledge of:	
a. Potential program components (e.g., activities, food and beverages, décor and design, educational sessions, speakers)	
b. Structure and sequence of program components	
c. Sources of human, physical, and financial resources	
d. Meeting or event objectives	
e. Attendee profile	
f. Previous program evaluation results/reports	
Skill in:	
a. Analyzing previous year's program and evaluation report, if applicable	
b. Incorporating meeting or event objectives, and education and learning principles	
c. Researching new ideas, including: reviewing programs of other similar meeting or events, surveying target market(s), determining attendee expectations (e.g., conducting brainstorming and other idea-generating exercises), and identifying opportunities for innovation	
d. Identifying desired program components (e.g., speakers, entertainment, attractions, activities, ancillary programs)	
e. Determining that desired components meet legal and regulatory requirements	

f. Generating cost estimates and discussing details with stakeholders and colleagues	
g. Gaining stakeholder support for program components	
Sub Skill 13.7: Define program content and delivery methods aligned with meeting goals and objectives in support of the strategic plan.	Sub Skills 14.02 and 14.03 combined
Knowledge of:	
a. Education and learning principles	
b. Theme of meeting or event	
c. Projected attendance	
d. Legal requirements	
e. Participation patterns	
f. Contract requirements	
g. Time frame, meeting, or event critical path	
h. Site design	NEW
i. Communication plan	NEW
Skill in:	
a. Identifying options, (e.g., sending out requests for proposals/bids, contacting agents and speakers' bureaus, identifying key personnel), communicating meeting or event needs with speakers and entertainers	
b. Matching program format and outcomes to stakeholder objectives	
c. Selecting options that meet needs and constraints (e.g., legal, site, budget, educational goals)	
d. Aligning program components and marketing strategies to meeting or event objectives	
e. Securing program components: approving conditions/expectations/deliverables, agreeing on provision of program component requirements (e.g., technical needs)	
f. Determining requirements for each program component (e.g., production times, location, personnel, setup requirements)	
g. Presenting program content and delivery formats to stakeholders for input and approval, as necessary	
h. Allocating required resources	
i. Identifying contiguous and concurrent program components	
j. Implementing protocols for ceremonial/religious/political components	

k. Incorporating marketing activity requirements (e.g., contest winners, competitions, announcements)	
l. Compiling program agenda	
m. Assigning roles to staff and volunteers within their skill sets	
n. Developing contingency plan for program components	
o. Creating required documents, including script, detailed agenda, and production schedule	
Sub Skill 13.8: Analyze the event outcomes according to predefined metrics to measure achievement of goals and objectives.	14.04
Knowledge of:	
a. Return on investment (ROI)	
b. Return on objective (ROO)	
c. Approaches to evaluation	
Skill in:	
a. Conducting ongoing measurement of the event against the objectives	
b. Developing benchmarks	
c. Creating tools for measuring success (e.g., surveys)	
Skill 14: Engage Speakers and Performers	Sill 15
Sub Skill 14.1: Determine meeting or event requirements for speakers and performers using the event design to align with meeting or event goals and objectives.	15.01
Knowledge of:	
a. Times, locations, or activities that require speakers and performers	
b. Requirements for performers	
c. Types of available speakers and performers (e.g., musicians, presenters)	
Skill in:	
a. Identifying types of speakers or performers to meet goals and objectives	
b. Selecting speakers and performers (e.g., using speaker bureaus, agents, directories)	
Sub Skill 14.2: Define strategies and criteria for speaker and performer selection referencing the goals or objectives to fulfill the program requirements.	15.02
Knowledge of:	
a. Audience demographics, political environment, and culture	
b. Type of program required	

c. Proposed time, duration, and location	
Skill in:	
a. Seeking input on selection criteria	
Sub Skill 14.3: Choose speakers or performers using selection criteria to achieve meeting or event objectives.	15.03
Knowledge of:	
a. Meeting and event objectives	NEW
Skill in:	
a. Researching candidates' performance (e.g., live selection or recorded)	
b. Recording comments and ratings based on selection criteria	
c. Selecting performers or speakers	
Sub Skill 14.4: Secure speaker and performer contracts and communicate expectations aligned to event design to achieve meeting or event objectives.	15.04
Knowledge of:	
a. Principles of negotiation	
b. Components of legal contracts	
c. Meeting or event requirements	
Skill in:	
a. Negotiating contracts	
b. Monitoring contracts to determine that obligations are fulfilled	
c. Conducting ongoing communication with speakers and performers, including expectations of both parties, attendee expectations, goals of meeting, logistics, attendee profile, performance limitations (e.g., dress code), and cultural information	
d. Integrating contractual obligations into meeting or event's critical path	
e. Following up on issues (e.g., agreeing on action to rectify non-compliance, dealing with breaches of contract within acceptable time frame)	
f. Evaluating performer or speaker performances to identify strengths and weaknesses	
Skill 15: Coordinate Food and Beverage Services	Skill 16
Sub Skill 15.1: Identify needs and establish guidelines for food and beverage services to meet meeting budget and objectives.	16.01
Knowledge of:	
a. Operational constraints due to venue, site, or climatic conditions	

b. Dietary preferences, restrictions and cultural protocols	
c. Principles and legal requirements of food safety	
d. Attendee profiles	
e. Program schedule	
Skill in:	
a. Identifying considerations (e.g., theme, sponsors, licensing requirements, attendee profile, trends)	
b. Developing guidelines for acquiring products and services (e.g., tendering, direct purchase), establishing controls (e.g., quality, security), and establishing methods of distribution (e.g., paid or complimentary)	
c. Complying with applicable jurisdictions (e.g., liquor, public health)	
d. Confirming date, time, and location of food and beverage services	
e. Performing quantity calculations	
f. Determining supplies and equipment required (e.g., dishes, cutlery, glasses, tables, table linens, ice, tickets)	
g. Arranging for equipment to be set up and operational; supplies to be delivered and available; delivery; storage; returns and recycling of bottles; security for cash, alcohol, and tickets; and staff training in responsible beverage service	
h. Scheduling staff (e.g., determining number of staff required, identifying tasks to be completed post schedule)	
Sub Skill 15.2: Select food and beverage service provider(s) and menu(s) following event design and within budget.	16.02
Knowledge of:	
a. Attendee profile	
b. Current food and beverage trends	
c. Event history (e.g., past selections)	
d. Venue and location	
Skill in:	
a. Determining food and beverage requirements, including menu, arrangements to meet dietary needs or concerns, number of people, cancellation policy, margin for adjustment (e.g., gratuity), and minimum guarantee	

b. Identifying requirements for refreshment and beverage services, including supplies (e.g., alcohol, mixes, condiments, glassware, ice) and type of bar service (e.g., cash or host)	
c. Addressing storage (e.g., refrigeration) space requirements	
d. Setting menus, including consulting with key stakeholders or sponsor, incorporating nutritional requirements, accommodating dietary restrictions, and addressing cost considerations	
e. Ensuring that serving staff are knowledgeable about menu and ingredients	
Sub Skill 15.3: Use relevant rules and regulations to manage alcohol service to comply with legal, organizational, and event policies. Sub Skill 16.03: Plan service style(s) Sub Skill 16.04: Select Food and Beverage provider(s)	16.05 – Sub Skills 16.03 and 16.04 removed
Knowledge of:	
a. Training programs	
Skill in:	
a. Addressing liabilities and insurance requirements	
b. Identifying type of alcohol service (e.g., cash bar, host bar)	
c. Ensuring that staff are trained in responsible beverage service	
d. Monitoring alcohol service	
e. Complying with applicable jurisdictions	
Skill 16: Design Environment	Skill 17
Sub Skill 16.1: Determine event design and theme requirements based on stated objectives that meet attendee and organizational expectations.	17.01
Knowledge of:	
a. Attendee profile	NEW
b. Design concepts of meetings or events (e.g., learning formats, ergonomics)	
c. Current trends	
Skill in:	
a. Enhancing attractiveness and functionality of meeting or event	
b. Incorporating movement, methodology, and message into design concept	
c. Creating an environment to enhance performance, encourage desired behavior and learning, and fulfill stakeholder contract	

obligations (e.g., meet organization’s brand requirements)	
d. Integrating theme, branding, and ambience into meeting or event environment	
e. Identifying needs (e.g., registration area, meeting rooms, exposition, storage, accessibility)	
f. Complying with applicable jurisdictions (e.g., balloon releases, fireworks, lasers, capacity)	
Sub Skill 16.2: Select décor based on event design to support the requirements of the meeting or event.	17.02
Knowledge of:	
a. Décor elements for functional and experiential contexts	
b. Props, scenery, and decorations	
c. Design trends	
d. Theme, budget, and objectives of meeting or event	
e. Safety and security of attendees	NEW
Skill in:	
a. Reviewing theme, budget, and objectives of meeting or event	
b. Identifying assets and limitations of site	
c. Determining desired atmosphere for meeting or event	
d. Designing elements of décor plan including meeting or event theme and images, incorporating signage obligations (e.g., as defined in contract requirements), incorporating audiovisual or technical elements as appropriate, and complying with legislation (e.g., fire-retardant materials)	
e. Submitting draft plan for approval as necessary to appropriate parties (e.g., board of directors, clients, fire marshal, stakeholders, levels of government)	
f. Communicating plan to appropriate parties (e.g., site manager, meeting or event coordinator and staff)	
g. Researching and securing décor and furnishing suppliers	
Sub Skill 16.3: Coordinate meeting or event signage by following the marketing plan to meet the requirements of the meeting or event.	17.03
Knowledge of:	
a. Types of signage (e.g., digital, human, printed, sustainable)	

b. Special accommodations signage (e.g., braille)	NEW
c. People and vehicular traffic patterns and traffic flow design	
d. Signage restrictions	
Skill in:	
a. Identifying signage requirements for meeting or event (e.g., language)	
b. Developing signage that provides information and identification	
c. Selecting signage that enhances desired and/or required traffic flow	
d. Researching and selecting appropriate suppliers	
e. Coordinating installation and placement of signage at meeting or event	
f. Evaluating effectiveness of signage placement and attendee experience	NEW
Skill 17: Manage Audiovisual and Technical Production	Skill 18
Sub Skill 17.1: Identify staging and technical equipment requirements using event design to support meeting or event objectives.	18.01
Knowledge of:	
a. Site limitations and restrictions (e.g., organized labor, low ceilings, pillars)	NEW
b. Program objectives	
c. Audiovisual and production fundamentals	
d. Special requirements (e.g., hearing impairment, vision impairment, allergies) of attendees, speakers, and performers	
e. Current trends and technologies	NEW
Skill in:	
a. Reviewing program elements	
b. Determining staging and set requirements (e.g., size, height, surface, capacity)	
c. Identifying equipment needs (e.g., lighting, sound, audiovisual, infrastructure, safety equipment, special effects, Internet access)	
d. Securing permits or approvals for staging and equipment	
e. Specifying spatial needs and temporal and infrastructure requirements and restrictions	
Sub Skill 17.2: Acquire staging and technical equipment based on defined requirements to support the event design.	18.02
Knowledge of:	

a. Staging and technical equipment specifications	
b. Types of suppliers and contractors	
c. Technical terminology	NEW
Skill in:	
a. Coordinating specifications (e.g., detailing precise requirements for staging and equipment to be acquired, using proper product and service terminology)	
b. Researching suppliers and contractors (e.g., obtaining quotes as necessary, negotiating and obtaining staging and equipment)	
Sub Skill 17.3: Install staging and technical equipment based on defined requirements to support the event design.	18.03
Knowledge of:	
a. Staging and equipment specifications	NEW
b. Contingency planning	
Skill in:	
a. Coordinating logistics of installing staging and equipment within meeting or event site (e.g., timing of arrival and delivery, placement)	
b. Addressing safety issues or concerns (e.g., electrical cords, railings)	
c. Determining availability of installation equipment, machinery, tools, and other assistive devices	
d. Hiring skilled installation professionals as required (e.g., stagehands, riggers, electricians)	
e. Monitoring installation to identify necessary adjustments	
f. Conducting stage area walkthrough with appropriate personnel (e.g., technician, stage manager) to determine that requirements have been met regarding stage, lighting and audiovisual, special effects, stage security and safety, storage areas, and Internet access	
Sub Skill 17.4: Oversee technical production and operation based on defined requirements to support the event design.	18.04
Knowledge of:	
a. Stage management	
b. Team leading and delegating	
c. Safety and integrity of staging and equipment (e.g., access to power, weight load restrictions)	

d. Location from which technicians will operate (e.g., booth, table, area, trailer)	
Skill in:	
a. Coordinating with technical director and equipment operators	
b. Communicating roles, responsibilities, restrictions, and timelines with technical personnel	
c. Providing sufficient time and access for performer and technical rehearsals and equipment checks, including evaluation of all elements of program (e.g., program content, entertainers, sound, special effects, Internet) and adjustment of timing and sequencing	
d. Monitoring technical operations during meeting or event	
e. Managing disruption to performance or program	
Skill 18: Develop Plan for Managing Movement of Attendees	Skill 19
Sub Skill 18.1: Develop admittance management plan to control protocols and efficiency.	19.01
Knowledge of:	
a. Admission and access control methods	
b. Registration process (e.g., ticketing systems)	
c. Crowd management techniques	
Skill in:	
a. Analyzing needs and requirements (e.g., capacity, criteria of access, restrictions)	
b. Selecting admittance systems to be used (e.g., registration procedures, tickets, name tags, photo identification, wristbands)	
c. Selecting technology to support admission systems	
d. Consulting with specialists (e.g., local police, security companies)	
e. Drafting plan for admittance, including criteria, levels/categories (e.g., general admission, VIPs), methods, security, requirements for other on-site admission, communication policy, and special needs of attendees	
Sub Skill 18.2: Develop a plan for effective crowd management.	19.02
Knowledge of:	
a. Communication plan	
b. Accessibility	

c. Sources of specialist assistance in relation to crowd control (e.g., security companies, police)	
Skill in:	
a. Developing crowd management strategies for traffic flow (e.g., circulation, congregation), conditions exceeding thresholds (e.g., regulatory capacity levels), attendee behavior, and restrictions	
b. Determining appropriate entry and exit locations while considering admittance credentials, seating systems, safety, traffic flow, and queue management	
c. Ensuring that space, facilities, and services are adequate for attendees	
d. Verifying that appropriate signage is used	
e. Communicating policies and expectations regarding attendee behavior and restrictions	
f. Using systems and personnel to manage and monitor crowd conditions and behavior (e.g., having systems in place to respond to situations that exceed pre-established thresholds)	
g. Obtaining services and equipment (e.g., ushers, security, signs, barricades, technology)	
h. Securing approval of authorities (e.g., fire marshals)	
i. Making sure that specific risk management issues associated with crowds are in place	
Sub Skill 18.3: Coordinate housing requirements and define policies to align with organizational standards.	19.03
Knowledge of:	
a. Types of accommodations	
b. Reservation procedures and policies	
c. Cancellation policies	
d. Attrition	NEW
e. Deposit requirements	
f. Payment procedures	
g. Room blocks and rates	
h. Corporate travel policies	
Skill in:	
a. Coordinating accommodations (e.g., informing participants of reservation process) and responsibility (e.g., housing bureau, self-booking)	
b. Determining and managing room blocks	NEW
c. Determining accessibility requirements	NEW

Sub Skill 18.4: Coordinate transportation requirements and define policies to align with organizational standards.	19.04
Knowledge of:	
a. Types of transportation available	
b. Reservation procedures and policies	
c. Cancellation policies	
d. Deposit requirements	
e. Payment procedures	
f. Organization and corporate travel policies	
Skill in:	
a. Organizing transportation	
b. Analyzing needs and options (e.g., airlines, taxis, charter buses), negotiating and contracting suppliers, ensuring accessibility	
c. Informing participants of reservation process and responsibility (e.g., deadlines, rates, self-booking)	
Sub Skill 18.5: Follow established protocol guidelines by adhering to organizational and situational requirements.	19.05
Knowledge of:	
a. Protocol resources (e.g., foreign affairs, diplomatic missions, United Nations, protocol officer)	NEW
b. Titles and salutations (e.g., King, Queen, Prince, Princess, Honorable, Right Honorable, Excellency)	
c. Styles of address	
d. Religious, cultural, and ritual requirements	
e. Regulatory issues (e.g., immigration, traffic laws)	
Skill in:	
a. Determining protocol requirements (e.g., invitations, reception room, seating arrangements, introductions, transportation, accommodations, security, national anthems, business cards)	
b. Securing appropriate personnel (e.g., to conduct ceremonies, to accompany VIPs)	
c. Arranging for ceremonial equipment (e.g., flags)	
Domain H: Site Management	
Skill 19: Select Site	Skill 20
Sub Skill 19.1: Complete needs assessment using event design to determine site specifications.	20.01
Knowledge of:	

a. Target market(s)	
b. Accessibility needs of special populations (e.g., VIPs, individuals operating motorized vehicles)	
c. Purpose of event or meeting	
Skill in:	
a. Reviewing nature, scope, complexity, and fiscal requirements of meeting or event (e.g., budget, profile and image, facilities licensing, season, anticipated attendance, flexibility, accessibility security and safety needs)	
b. Determining desired or required geographic location and type of facility for meeting or event	
c. Defining spatial needs, proximity, and housing patterns and accessibility requirements for site	
d. Identifying dates and durations of site occupancy	
e. Developing site selection criteria	
Sub Skill 19.2: Identify and inspect sites based on event design and according to selection criteria.	20.02
Knowledge of:	
a. Site infrastructure	
b. Risk management factors	
c. Budgetary restrictions	NEW
Skill in:	
a. Researching potential sites (e.g., reviewing sites of similar types and scopes of meeting or events) and researching competing events	
b. Conducting site inspection, including investigating and evaluating site (e.g., using site checklist, verifying viability of facilities and services, determining availability of services)	
c. Prioritizing selection criteria	
d. Evaluating possible sites, including evaluating location based on proximity to hotels, availability of parking in area, and accessibility (e.g., public transportation, air lift) and rating sites based on dates, rates, space, guest rooms, and other capabilities or constraints	
e. Identifying best site and communicating information to colleagues and key stakeholders to secure approval	

f. Reserving and confirming site (e.g., negotiating and contracting facility, outlining responsibilities)	
g. Maintaining and developing effective working relationship with venue personnel	
Skill 20: Design Site Layout	Skill 21
Sub Skill 20.1: Develop site maps and floorplans according to event design and requirements to achieve event goals and objectives.	21.01
Knowledge of:	
a. Adult learning principles	
b. Meeting or event profile, features, budget, and program	
c. Meeting or event concept and theme	
d. Budgetary implications	
e. Applicable jurisdictions (e.g., access, fire codes)	
Skill in:	
a. Determining needs for space, structures (e.g., fixed and temporary), adult learning needs, utilities (e.g., power, water, sewage, gas), parking, communications, areas for first aid and lost children, emergency access, legal requirements (e.g., fire regulations), signage, translation or interpretation needs, and accessibility	
b. Confirming location of structures and facilities within site	
c. Drafting site plan, recognizing: structures (e.g., existing permanent and temporary), facilities, services, exhibit space, meeting or event program, attractions, human and vehicular traffic flow, environmental implications, best use of resources, security, and meeting service areas (e.g., registration, bookstore)	
d. Establishing space assignments and setup configurations: obtaining expert advice on configuration when needed, building in flexibility to allow for adjustments, detailing placement and configuration (e.g., orientation of temporary structure openings), and implementing accurate scale diagrams	
e. Inspecting site and reviewing site plan for accessibility, washrooms, obstructions, capacity limits, loading dock or loading	

entrance, special needs parking, vehicle road access, and utilities	
f. Adjusting and communicating changes to site plan	
Skill 21: Manage Meeting or Event Site	Skill 22
Sub Skill 20.1: Create logistics plan for site setup, operation, and takedown using event design to achieve goals and objectives.	22.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Confirming access to site (e.g., specific date and time)	
b. Preparing detailed production schedule, including floor plans, timing, room setups, personnel required, roles and responsibilities, exhibit setup, and security (e.g., badge checkers, personnel)	
c. Making arrangements for shipping/receiving and storage	
d. Determining that human resources are available for setup and takedown	
e. Defining and implementing site move-in and move-out requirements and restoration including key contact points	
f. Communicating plan to appropriate individuals	
g. Integrating plan with other aspects of meeting or event	
Sub Skill 21.2: Implement logistics plan during site setup to meet event design and requirements.	22.02
Knowledge of:	
a. Contractual obligations with suppliers	
b. Delivery schedules	
c. Health, safety, security, and environmental considerations	
Skill in:	
a. Confirming access to site	
b. Communicating production schedule and responsibilities to appropriate individuals (e.g., staff, suppliers)	
c. Determining that personnel are familiar with equipment being used	
d. Following up to determine that progress is being made according to production schedule (e.g., arrival of services, deliveries and	

equipment, arrival of related groups, technical rehearsal time and performer/participant orientation, special facilities including dressing rooms, guest rooms/lounges, equipment rooms, and staff office)	
e. Ensuring that equipment is checked and operational	
f. Determining and coordinating inbound inventory	
g. Adapting plan to changing circumstances (e.g., briefing all personnel involved)	
Sub Skill 21.3: Implement logistics plan during event to meet event design and requirements.	22.03
Knowledge of:	
a. Typical systems, procedures, and logistics for on-site management	
b. Contractual obligations	
Skill in:	
a. Monitoring meeting or event operation through observation and appropriate communication and control mechanisms	
b. Identifying, analyzing, and implementing response plans to operational problems or need for additional services as issues arise	
c. Monitoring and determining effective delivery of services through ongoing communication with contractors	
Sub Skill 21.4: Implement logistics plan during dismantle to meet event design and requirements.	22.04
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Communicating production schedule and responsibilities to appropriate individuals (e.g., staff, suppliers)	
b. Returning site to condition specified in contract/agreement (e.g., determining that equipment is checked and operational, confirming that suppliers have removed their items from site, removing hazards caused by installation of temporary structures, removing waste and decorations, considering recycling options)	
c. Debriefing personnel and identifying relevant points for meeting or event evaluation	

d. Completing all relevant documents and records according to organization's procedures	
Skill 22: Manage On-site Communications	Skill 23
Sub Skill 22.1: Define on-site communications plan aligned with marketing plan to meet event goals and objectives.	23.01
Knowledge of:	
a. Communication models and processes	
Skill in:	
a. Defining communication needs of meeting or event (e.g., individuals, meeting or event features)	
b. Identifying types of messages to be communicated to internal and external public and personnel (e.g., announcements, updates, results, changes) and outlining content and style of messages to be communicated, including terminology and language	
c. Developing communication resources including verification documentation (e.g., specifications guidebook, production book) and contact lists (e.g., attendees, staff, suppliers, emergency services)	
d. Setting up communication channels that facilitate flow and scope of communication needs	
Sub Skill 22.2: Determine and secure required communication equipment and resources to meet event requirements.	23.02
Knowledge of:	
a. Communication equipment and resources	
Skill in:	
a. Analyzing needs while considering type and size of venue and users (e.g., staff and volunteers, emergency personnel)	
b. Developing guidelines for users (e.g., frequencies, usage) and issuing and maintaining equipment	
c. Obtaining equipment and services (e.g., cellular telephones or mobile devices, two-way radios, pagers, PA system, web-based technology, tablets)	
d. Integrating technology from all parts of meeting or event into communication plan (e.g., technical production, signage)	

Sub Skill 22.3: Specify communication procedures and protocols for each audience based on the event requirements.	23.03
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Specifying techniques for internal and external communications (e.g., written, audio, visual, and electronic)	
b. Identifying types of messages to be communicated	
c. Coordinating briefing and debriefing meetings	
d. Establishing the protocols and monitoring communications (e.g., radio discipline)	
e. Creating a plan and team for crisis or emergency situations (e.g., equipment failure)	
f. Training staff in use of equipment, locations of services, and protocol (e.g., what is appropriate to relay by radio)	
Domain I: Marketing	
Skill 23: Develop marketing plan	Skill 24
Sub Skill 23.1: Conduct a situational analysis using historical and current data to develop the marketing plan to meet goals and objectives.	24.01
Knowledge of:	
a. Data collection and analyzing techniques	
b. Marketing models and concepts such as “marketing mix”	
c. Mission statement, goals, and objectives	
Skill in:	
a. Reviewing historical data (e.g., surveys, evaluations, budget)	
b. Evaluating meeting or event features (e.g., location, service, merchandise, resources, promotion, price, image)	
c. Assessing target market(s)	
d. Defining attendee/participant needs and expectations	
e. Analyzing community infrastructure and resources	
f. Researching new marketing techniques and platforms available	
g. Identifying opportunities to expand into new markets	
h. Determining legal and regulatory restrictions that may affect meeting or event	

i. Summarizing results of situational analysis, including making recommendations and conclusions while considering budget and resources	
Sub Skill 23.2: Identify target market segments using the situational analysis to determine key features, products, and services.	24.02
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Developing profiles of potential meeting or event attendees/participants/exhibitors/sponsors (e.g., using demographics and psychographics)	
b. Matching target segment profile to features, products, and services	
c. Defining geographic reach of meeting or event	
Sub Skill 23.3: Select marketing distribution channels using the situational analysis that aligns with the marketing plan.	24.03
Knowledge of:	
a. Different types of marketing platforms (e.g., social media, advertising, email campaigns)	
Skill in:	
a. Analyzing available distribution channels for market penetration	
b. Matching messages to target market(s) using best approach	
c. Selecting most effective distribution channels that provide best return on investment	
Sub Skill 23.4: Implement marketing plan to reach targeted segments to support the goals and objectives of the meeting or event.	24.04
Knowledge of:	
a. Available marketing platforms (e.g., social media, advertising, email campaigns)	
b. Target market preferences	
Skill in:	
a. Communicating goals and objectives of plan	
b. Coordinating and monitoring marketing activities with other aspects of meeting or event production	
c. Adjusting marketing plan and communicating changes to stakeholders	
d. Developing evaluation of marketing activities	

e. Maintaining consistency with brand and message with mission statement, goals, and objectives	
Skill 24: Create and Manage Marketing Materials	Skill 25
Sub Skill 24.1: Determine marketing materials that meet target market needs and support the goals and objectives.	25.01
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Determining marketing collateral needed for marketing and meeting or event activities (e.g., brochures, programs, tickets)	
b. Analyzing media available to meet requirements (e.g., print, electronic)	
c. Identifying marketing message for each target market segment	
d. Selecting marketing platforms	
Sub Skill 24.2: Develop marketing content and design specifications based on the marketing plan to maximize impact.	25.02
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Determining style of marketing collateral for target market (e.g., design, format)	
b. Incorporating and monitoring brand message (e.g., logos, slogans, positioning statements)	
c. Approving/preparing layout for printing and production	
d. Securing permission to use intellectual property, copyrighted materials, and licensed materials	
Sub Skill 24.3: Produce and distribute marketing materials to the target markets in alignment with the marketing plan.	Sub Skills 25.03 and 25.04 combined
Knowledge of:	
a. Procurement plan and processes	
b. Contact distribution lists	
c. Promotional activities schedule	
d. Potential impact of geographic location of provider (e.g., customs, shipping)	
Skill in	
a. Researching providers and communicating specifications	

b. Determining delivery method and deadline for each item produced (e.g., coordinating delivery logistics)	
c. Monitoring quality and accuracy of text and matching to specifications	
d. Organizing and assembling materials for distribution	
e. Complying with information management plan for archiving printed/imprinted materials	
Skill 25: Create and Manage Meeting or Event Merchandise	Skill 26
Sub Skill 25.1: Determine product design and specifications using the marketing plan to support the meeting or event objectives.	26.01
Knowledge of:	
a. Meeting or event theme, branding, and key messages	
Skill in:	
a. Reviewing historical data (e.g., types of merchandise, how and where sold, price points)	
b. Researching customer needs and interests	
c. Assessing need to modify or discontinue existing merchandise: identifying new or replacement merchandise	
d. Evaluating competition (e.g., other similar products, price points, merchandising venues)	
e. Determining potential liabilities and legalities associated with merchandise	
f. Defining product design and production specifications	
g. Identifying new marketing approaches and platforms	
h. Integrating product concepts with other marketing activities (e.g., advertising poster upgraded to merchandise quality poster)	
See Sub Skill 24.3	Sub Skills 25.03 and 25.04 combined
Skill 26: Promote Meeting or Event	Skill 27
Sub Skill 26.1: Develop cross-promotional activities to expand market reach aligned with the marketing plan in support of the goals and objectives.	27.01
Knowledge of:	
a. Impact of meeting or event on local community (e.g., economic benefits, social responsibilities)	
Skill in:	

a. Assessing potential partnership opportunities with sponsors, donors, suppliers, and other compatible organizations	
b. Evaluating opportunities and costs to promote meeting or event at venues of other non-competing meetings or events with similar target market segments	
c. Determining resource requirements (e.g., print materials and merchandise)	
d. Coordinating launch dates of each promotional activity	
Sub Skill 26.2: Develop promotions to create awareness through platforms to reach goals and objectives.	27.02
Knowledge of:	
a. Budget allocation	
b. Branding and message of meeting or event	
Skill in:	
a. Determining type of promotion(s)	
b. Assessing liabilities and legalities	
Sub Skill 27.03: Coordinate Hospitality	Sub Skill 27.03 removed
Skill 27: Contribute to Public Relations Activities	Skill 28
Sub Skill 27.1: Develop, implement, and manage public relations strategy to align with the marketing plan.	NEW – Merged Sub Skills 28.01-28.05
Knowledge of:	
The knowledge needed for this task is incorporated into the following skill statements.	
Skill in:	
a. Developing and implementing communications plans	NEW
b. Developing and implementing public relations strategies	NEW
c. Developing and managing emergency response and risk management plans	NEW
Skill 28: Manage Meeting-Related Sales Activities	Skill 29
Sub Skill 28.1: Reference the marketing plan and support development of the sales plan with objectives.	29.01
Knowledge of:	
a. Marketing plan	
b. Competitors' sales practices	
Skill in:	
a. Identifying legal, regulatory, and ethical requirements for sales	
b. Specifying revenue sources (e.g., registration fees, advertising, products)	

c. Setting sales objectives for all meeting or event products (e.g., reviewing historical data on previous sales figures, identifying previous target market segments)	
d. Defining potential target market segments	
Sub Skill 28.2: Execute activities from the sales plan to meet the goals and objectives.	29.02
Knowledge of:	
a. Procurement plan and process	
Skill in:	
a. Integrating sales tactics with promotional and advertising activities to encourage desired consumer behavior	
b. Using sales tools and tactics (e.g., qualifying leads, conducting sales calls, delivering sales presentations, packaging products, providing sales incentives, providing giveaways, using telephone sales)	
c. Closing sales, including negotiating sales details (e.g., cost/price, shipping fees) and setting dates for product delivery (e.g., booth setup, merchandise delivery)	
d. Checking for unauthorized on-site or remote sales activities	