

Senior Meeting Planner – Latin America
Meeting Services

ROLE PURPOSE

Achieve operating cost leadership in the management of meeting planning. Plan processes through the following actions:

- Meeting Planning
- Purchasing/Airline Services/Data Services/Airline Administration
- Enhance Team Environment
- Optimize Customer Relationship Mgmt./Continuous Improvement opportunities
- Implement Resource/Performance Management processes
- Team Environment

ROLE BACKGROUND

Team: Meeting Planning

Reports To: Manager/Director, Meeting Services

Minimum Previous Experience: 4-5 years in Meeting Planning & Data Entry

Education (Minimum required): College Degree preferred (or equivalent experience)

Previous Logical Role(s): Transfer, Outside Hire

Role Location and other items: M&I's Caledonia, WI Office or Virtual Office in USA

RESPONSIBILITIES

1. Provide Meeting Planning services as outlined in the Meeting Planning Policy and Procedure Manual, **specifically for Latin America, must be fluent in Spanish and Portuguese**. The level of meeting will vary with a larger percentage of work designed around incentives, National meetings, multi-venue meetings, high-level meetings, etc.
2. Lead each of your meetings to success by working as a team with the Sourcing, Data, Air and Accounting Departments through clear and concise communication.
3. Optimize service delivery by identifying and tracking customer needs and satisfaction.
4. Provide financial management and support to each of the meetings that you manage through cost-savings tactics, negotiations and budgetary management.
5. Communicate, liaise, and negotiate with all vendors using appropriate methods to facilitate the development of profitable business, measurable cost savings and sustainable relationships.
6. Develop & support client relationships by being an active resource to them and by offering guidance on Industry trends. Initiate conversation on future projects and how we can partner with them through meeting support, placement and planning based on their Meeting Calendar.
7. Communicate in a clear, concise and effective manner when working with internal personnel on all levels and also with outside individuals including clients and vendors
8. Attend training and industry events to develop relevant knowledge, industry trends, techniques and skills.

Person profile – Senior Meeting Planner

Personality: Self-driven, results-oriented with a positive outlook, and a clear focus on high quality and business profit. Demonstrates flexibility in adapting to change. Conscientious, dependable and accepts responsibility to all assigned tasks by meeting and exceeding deadlines. Well presented and businesslike. Sufficiently mobile and flexible to travel. Eager for new experience, responsibility and accountability. Able to get along with others and be a team-player.

Personal Situation: Must be mature and domestically secure and able to spend five to seven nights away per month without upsetting domestic situation. Able to commute reliably to office base and work extended hours on occasions when required.

Specific Job Skills: Well-organized, detail oriented, clear communicator, customer service driven and intrapersonal skills to work well with a team.

Computer skills: Must be fluent in use of MS Office 2000 or later, particularly Excel and Word, Internet, Star Cite and email.

Literacy and Finance: Able to understand profit and loss calculations and basic business finance, e.g., cash-flow, overheads, etc. Must be a competent business letter writer.

Business and Selling Skills: Must be an excellent face-to-face and telephone communicator. Able to demonstrate success and have experience managing major accounts, customers and large contracts or even a business, particularly achieving genuine sales development.

Communication (Written and Verbal)

- Clients - Communication with the client should be clear, concise and professional at all times. Clients should be addressed with mutual respect whether top-level management or clerical staff. Establishing rapport with a client fosters additional business and a solid working relationship with the client. Remember that the client is always right.
- Peers - Communication with peers should be based on mutual respect. Striving to have effective communication among peers is essential to the overall work environment.

Senior International Meeting Planner – Latin America - Meeting Services Confidential and Proprietary Information March 2009

The statements submitted on this role description are intended to describe the general nature and level of work being performed by people assigned to this role. However, an incumbent is not limited to the responsibilities described by this role.

- Vendors - Communication with vendors should be professional. The vendors used are considered our partners and are valuable to the continued growth and success of this business.
- Management – Clear, concise and effective communication with the President is essential to maintaining a positive work environment. In addition, following through on directives from President is imperative.
- Policy and Procedures- Adherence to all Meetings & Incentives policies and procedures in conjunction with all functions of this position is necessary to maintain work ethic and environment. A cooperative attitude enhances accomplishment of work assignments
- Attitude/Performance- The attitude of an employee can affect the attitudes of his or her peers. It is imperative for an employee to respect his or her co-workers. If an employee has a concern, he or she should contact the President as needed.

Physical Requirement (0-12%)	RARELY (12-33%)	OCCASIONALLY (34-66%)	REGULARLY (67-100%)
Seeing: Must be able to read Reports and uses computer.			X
Hearing: Must be able to hear	well enough to communicate with co-workers & clients.		X
Standing/Walking			X
Climbing/Stooping/Kneeling:		X	
Lifting/Pulling/Pushing:		X	
Fingering/Grasping/Feeling:			X
Must be able to write, type, and use phone system			X

Working Conditions: Normal-working conditions, teamwork environment.