



Instructions – Create New Project

Important: Hold the “Ctrl” key on your keyboard while clicking the “F” key to search this document.

More detailed is provided below but the simple process is that you first create your project/meeting and upload your own meeting specifications. The SYM system provides you with an “eRFI Link” that you distribute to your hotel, CVB and hotel national sales contacts. The hoteliers bid using the eRFI Response form and in real-time you see an instant online availability grid of the hotels as they respond, that you can export with 1-click to Excel.

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1. Be sure to read the SYM Tips & FAQ document

- [SYM Tips & FAQ](#)

2. Preparation of your Meeting Resume

A clear and descriptive meeting resume is critical for a hotelier to understand your needs and expectations. A great resume leaves little room for misinterpretation and significantly reduced unnecessary phone calls and emails from your suppliers and results in quicker hotel responses from more properties, while reducing your work load.

Items to have ready to begin:

- **Meeting Name** (Project Name in SYM) – How you refer to this meeting (eg. AARP 2014 Annual Meeting). Including your Organizations name, year or month, and name of the meetings is advised. The Meeting Name you use in SourceYourMeting.com (SYM) should be a more descriptive name than what you might have the hotel actually post onsite at the meeting. This makes filtering and searching on the Manage Projects page easier). Be sure this listed the same way at the beginning of your Meeting Resume as well (This is often different the Meeting Name that the Hotel will actually post on-site at your meeting)

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- **ProjectID** – Whatever ID you wish to use to identify this program (eg. an accounting code, unique identifier, etc). This can be useful for tracking related documents and communication at your organization as well. Be sure you indicate it on the first page of your Meeting Resume and you will use this same ID when you “Create Project” in SYM.
- **Preferred Dates** – The date ranges of the preferred dates you will be offering the hotels. The “Check-in Date” is the date your first contracted overnight accommodations arrive. The “Check-Out Date” is the date the last contract room will check-out (additional options result in increased availability)
 - a. **IMPORTANT:** Preferred Option Dates in your meeting specifications must match the dates you enter on the Create New Project form (Ex. “Preferred Option 1”, “Preferred Option 2”)
- **Your Meeting Resume (some also refer to as an RFP or meeting specs)** – This is the document where you have your meeting specifications. The hotel must meet in order to accommodate the program. A second document can be uploaded as well (ie. room diagram or addendum clauses).
 - a. See the [Meeting Resume Template \(MS Word\)](#) provided under “**Support Documents**” on the Support Page for tips on ways you can enhance your Meeting Resume.
 - b. With the goal being that you want hotels to respond quickly to your eRFI it is best to avoid asking the hotel to respond to questions that don’t directly relate to your short-list decision making.
 - c. Don’t ask the hotel to upload document to you when they respond on the eRFI unless it is absolutely necessary for your short-list decision. If you do need for the hotel to upload a document or layout to you when they bid, indicate it here.
- **Email addresses** – have the email addresses of your CVB, National Sales, and Hotel contacts you normally distribute to accessible for sending the eRFI.
- **Hotel Response Date** – Hotel have until this date to submit an eRFI bid. The eRFI form is no longer accessible to them once this expires. You can adjust this later on the Actions menu once you’ve logged in.

Prep Your Meeting Resume

- a. Consider the ([Meeting Resume Template \(MS Word\)](#)) provided under “**Support Documents**” on the Support Page for tips on ways you can enhance yours. You can use it as your own or just take the nuggets out that make yours float to the top, and get the responses you expect. If you aren’t going to use the Template then here are highly recommended minimum items to address:
 - b. **Make sure your Meeting Resume is just that, and not a response form. Hotels will not respond on your new SourceYourMeeting.com eRFI**
 - c. Make sure your meeting resume has the following at the beginning of the document:

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- i. "eRFI Link" the hotels will use to respond
- ii. eRFI Response Date – date you expect them to respond by
- iii. Date you will start accepting calls and emails (date after the eRFI Response date)
- iv. Make sure the Overnight Accommodations section is detailed (Ex. day, dates, Preferred Option 1, Preferred Option 2). Label each "Preferred Date" on your Meeting Resume as "Preferred Option 1", "Preferred Option 2", etc. Use those same dates when you "Create Project" in SYM. The more options you provide the better your results will be (Some believe that putting more dates results in hotels not bidding on your most preferred dates. That is incorrect!)
 - 1. **VERY Important:** Dates: Hotels look at your room block dates before they consider your meeting dates. For the best results, the **Check-in date** is the first date your contracted rooms check-in (not the first day of your meeting) and **Check-out** date is the date the last contracted room checks out.

Overnight Accommodations							
Respond with your Availability to each set of dates on the SourceYourMeeting.com "eRFI Link" provide							
Preferred Option 1	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##
Preferred Option 2	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##	##/##/##
Pattern	Wed						
Suites							
Single/Double							
Rms/Night							

- d. Add the "Responding to this Meeting Resume on the eRFI & Response Deadline" section and the "Completing the eRFI (Additional questions & Tips)" sections of the [Meeting Resume Template \(MS Word\)](#) to yours. You are welcome to use our Template as your own.

Responding to this Meeting Resume on the eRFI & Response Deadline
All responses to this RFI must be submitted using the eRFI Link below by in order to be considered.
PASTE eRFI LINK HERE (AND HIGHLIGHT IN GREEN)
eRFI Hotel Response Date (last date to submit a bid for this project): Day, Mmm ## YYYY (Date you will accept bids through – same date here as you enter when you "Create New Project" in SourceYourMeeting.com)
HOTELIERS: See instructions and tips for completing the eRFI Response Form on the last page of this Resume.



Completing the eRFI (Additional questions & tips)

Answer these questions on the eRFI in the corresponding eRFI section

Section 2) Who referred this project to your hotel

- It is important that you enter the CVB and/or National Sales contacts in this area so they receive the automatic email notification that you submitted the bid (it will save everyone hours of phone calls)

Section 4) Rates, Dates, and Space Availability

- If you have availability for the dates in your city please select "Yes" from the "Can you accommodate the Meeting Resume needs for dates in your city" column.
- Select Maybe if there is immaterial adjustment we could make to be accommodated and note it in the "Tell the planner more" field.
- Turn down the business complete the mandatory fields and select "No". "Can you accommodate the Meeting Resume needs for dates in your city" column.
- Use the "Tell the planner more" fields for comments about the specific dates (Deposit requirements)

- e. **VERY Important:** Planners often don't realize that one way to significantly reduce the number of pre-mature phone calls is to Indicate the date in which you will be available to take questions and communicate with the properties (And use our Communication Report to get updates out ASAP).

3. "Create Project" (Creating your new meeting)

- a. Select "Create Project" on the navigation bar
- b. Complete all required fields (red *) and upload your meetings resume document and add'l document (if applicable). There are tips next to each field on the form if you need additional help but here are a few thoughts.
 - i. Meeting Name: See "Items to have ready before you begin" section above.
 - ii. Uploading your [Meeting Resume Template \(MS Word\)](#) in Microsoft Word is recommended so the hotels will be able to see the details of the meeting and respond on the eRFI Form telling you whether they have availability or not on the various dates we can consider.
- c. **VERY VERY IMPORTANT:** Review your entries before clicking the "Complete" button
 - i. If later realize you made a mistake we recommend you
 1. Make it so hotels can no longer respond (the Actions menu for that project, selecting "Extend Hotel Response Date" and change it to today. Then archive the project.)
 2. Use the "Copy Project" functionality (See [SYM Tips & FAQ](#) for more information)
- d. Click "Complete" project to receive "eRFI Link"

4. Sending Your "eRFI Link"

- a. Open the email template ([Email Template for sending your eRFI Link - Microsoft Outlook \(.oft\)](#)) and paste the "eRFI Link" (The template is provided on the Support page). The template contains tips for you and is prepopulated with instructions for the hoteliers and CVBs. Additional insights on distributing your

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“eRFI Link” are provided in the template. (DO NOT send your Meeting Resume as an attachment. The “eRFI Link” gives them access to the Meeting Resume you uploaded and reduces email clutter and versioning issues by ensuring everyone must respond to your Meeting Resume via the same EZ eRFI (Attaching it will cause confusion and reduce the effectiveness of your process)

- b. Send the email to your CVB (Find a CVB rep at www.SourceYourMeeting.com/CVBSearch.php), National Sales or individual hotel contacts (If you need Hotel National Sales contacts for a particular hotel company email us at Support@SourceYourMeeting.com).
 - i. CVBs and NSO contacts just forward your email directly to their properties;
 - ii. They also access your specs using the same “eRFI Link”;
 - iii. They receive an email notification when each property they refer completes the eRFI Response Form;
- **VERY Important:** DO NOT allow hotels to email you their responses...indicate that “ALL responses must be on the eRFI Form in order to be considered”. (If they do try to respond by email see the **Communication examples in the [SYM Tips & FAQ](#) for verbiage you can use to respond**)

5. Hotels respond using the “eRFI Link”

- a. Who responds on the eRFI? In today’s marketplace there are many different contacts that might be responding based on their responsibilities at their hotel company. The great news is that in all cases the same “eRFI Link” is used. They just login as themselves (or create a new account, at no cost to them). Some examples of responders:
 - i. Hotel sales person
 - ii. Hotel sales persons assistant
 - iii. Regional hotel sales representative – someone who may sell multiple properties or a region of properties.
 - iv. National Sales Manager
- b. When the hotelier clicks on the link it takes them to the Welcome page for the eRFI (which contains a link to the documents you uploaded). Upon Hotelier submitting the eRFI they get email notification and so do the referrers they’ve entered.
- c. **VERY Important: DO NOT** let hoteliers email you their response. That defeats the purpose of automating the manual process you used to have. Let them know that all bids must come through the system in order for you to view them on reports and for you to have access to historical metrics (See [SYM Tips & FAQ](#) for communications examples for responding via email). If a hotel has any issues or

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- questions have them email Support@SourceYourMeeting.com and a representative will respond immediately.
- d. Even though the eRFI provides hoteliers with the ability to respond to your preferred dates they also can provide up to 2 alternative dates with rates, currency and comments should they not be able to accommodate your preferred dates or have a value proposition for considering such.
 - e. After submitting their eRFI the referrers receive an email notification, you (as the Project Manager (PM) receive an email confirmation and a Thank You page is displayed for the hotelier who filled out the eRFI.
 - f. Please see SYMeRFITemplateNAFields.pdf for the fields a hotel responds to on an eRFI.

6. Online Rate & Availability Grid, and 1-click export to Excel

- a. Once you send your “eRFI Link” you can begin reviewing the “Quick Grid” report on the Reports menu for that project. We find that our users typically use it for 2 primary reasons:
 - i. Before Project Close date: To check which hotels have responded or haven’t
 - ii. After Project Closes: To evaluate responses to create short-list
- b. See the [Managing Projects & Reports](#) for more information.
- c. See tips on customizing your Excel report in the [Tips for Excel, Outlook, and more \(pdf\)](#) Support document.
- d. **IMPORTANT:** Your suppliers will have the most respect for you if you keep them in the loop regarding changes in the decision making timeline. Use the Communications report to send quick emails to the Hotel Sales Contacts (Bidder) and CVB (Referrer) contacts (in a mass email or to just individual contacts)
Note: the recipients do not see the other people you sent it too. (See [SYM Tips & FAQ](#) for more detailed instructions)

Note: Once you create a project do not Unlink yourself from a project in the Actions menu. If you wish to keep your Active Projects window clean just Archive the project.