

Site Visit Set Ups and Follow-Throughs – Process & Best Practices

Introduction

As we look to increase the economic impact of the visitor-based economy in Edmonton, one of the tools we use to showcase and inspire more people to visit Edmonton for exceptional experiences and local expertise is the **Site Visit**.

The Sales Team actively engages planners, industry leaders and end users to bring meetings, conventions, and events to our city. The **objective** of a site visit is to verify, and supplement information presented in our bid proposal, both to allow the client to evaluate and confirm the descriptions we provide. It is an integral part of the product evaluation for our client and strengthens our sales process. Site visits are planned once Edmonton has been short-listed as a host destination option.

Site Visits are invaluable for providing details that will strengthen your value proposition, especially those that focus on Health & Safety, Contract Negotiation and Details, Space Activation, Event Implementation and Risk Assessment. While you have the client on your property, you can clarify any questions they have about your proposal and help them imagine what their event will look like in your space.

Background

According to the *Destination Analysts' Meetings Research Study* which surveyed 300 meeting and event planners in June 2020, planners are looking to organizations like ours as resources more than ever. 66% believed we need to continue to market our destination throughout 2020, and 76% consider it valuable when they publish hotel availability.

According to that same study, regarding virtual site tours – 23.3% of planners surveyed were VERY interested in this, and 44.3% were Interested.

Before we book a site visit, we will

1. First, consider whether an in-person site visit is the best option. Clients still want to see our city up close and personal.
2. Second, consider our duty of care as a destination – advanced safety precautions to promote health and peace of mind and possible travel restrictions
3. Third, what physical space are we looking to showcase, and can it be done virtually. Clients may have questions about HVAC systems, virology, cleaning protocols and event design.

Documentation and Preparation

Explore Edmonton has developed a new waiver that we send to our client prior to their visit.

Throughout the site visit, Explore Edmonton staff:

- Ask Health questions daily
- Wear masks at all times except while eating & drinking

- Practice Social distancing whenever possible (including in the vehicle)
- Do not exchange hardcopy documents
- Provide locally made mask & hand sanitizer in the welcome package
- Sanitize high touch surfaces in vehicle throughout the day (and keep Lysol wipes handy)
- Encourage using the AB Trace App
- Dine outside as much as possible

Explore Edmonton will prepare a detailed itinerary that provides background and timelines on our guests' visit. This will be distributed to our partners prior to the visit. During the visit, we will stay in touch to let you know whether we are running early or late.

Travefy

Explore Edmonton has revitalized the planning and execution of our site visits with a new itinerary management and communication software called [Travefy](#). This software enables greater internal efficiency with the planning and implementation of site visits.

This new tool has all the information you've come to expect of our itineraries, with many new and exciting features. We're able to allow the client to choose between a regular printed copy, an online version or the in-app version of the itinerary which we weren't able to do before. Both online versions allow for real time updates, videos and hyperlinks, and the app version also allows for in app messaging between host and client as well as notifications if enabled.

When you receive a new Travefy itinerary, we ask that you read it through carefully. At the bottom of the itinerary, or on the information & documents tab, is where we will attach our *Get To Know You* forms that the clients have completed, along with the most up to date RFP we have from the client. We can also attach pictures of the clients, your most up to date contact information for the client's ease of use, as well as photos and documents from your hotel. (Think floorplans, catering menus, certifications etc).

[Sample Travefy Itinerary](#)

As we move forward with this new platform we're excited about many new possibilities. If you have absolutely any questions, or energizing new ideas, please do not hesitate to reach out to our team.

Expectations

You can expect Explore Edmonton to make the arrangements to bring a client to Edmonton. We will confirm the dates, times and expectations with you, and will provide details on what the client will be wanting to see as well as what their delegate numbers may be.

Planners and end users are invited to our city to help facilitate their decision to bring their meeting, conference or event to Edmonton. Explore Edmonton looks to you to provide a behind the scenes glimpse into your operation. You know your business best, and have the most insights into what works, what doesn't, and what are the best creative options for the number of delegates that may be attending. After all, this is your product to position, your space to arrange, your attraction to be marketed and your brand to represent. Once we arrive on your site, our Explore Edmonton representatives will step aside to allow you to lead the way.

We look to you to help us to close a sale.

Planners are looking to us for:

- Help with Visualizing Social Distancing – set up a room that shows this for the expected numbers – Create new event layouts - Show, don't Tell
- Assistance with pivoting to a virtual or hybrid format – be prepared to answer what are your A/V capabilities?
- Flexibility in negotiations between planners and hotels - making it easier to rebook
- We need to be proactive in connecting with planners and offering help with safety measures, safety guidelines, general updates, cleaning practices, etc.

We are pleased to present our Healthy Venues Plan, preparing us for the safe reopening of the convention centres in compliance with the Government of Alberta Regulations.

Edmonton EXPO Centre [Healthy Venues Plan](#)

Edmonton Convention Centre [Healthy Venues Plan](#)

Evaluation

Confidence will remain a key issue - reassuring customers and visitors that business events can be operated in a controlled environment which adheres to local regulations and policies, and which can minimize associated health risks.

We therefore go through a feedback model post site visit with the client:

- What went well
- What was tricky
- What could we do differently

This will help to improve all our future site visits, make sure safety is a priority and ensure confidence in coming to Edmonton.