

Meeting Types

for the Healthcare Sector

This document profiles a range of meetings common to the healthcare sector.

The focus is to support those in operational positions to develop their understanding, thus enabling a smoother planning process for each meeting scenario. We encourage readers to share this with their teams and direct network however, any formal general use or publication should be made with the permission of the authors.

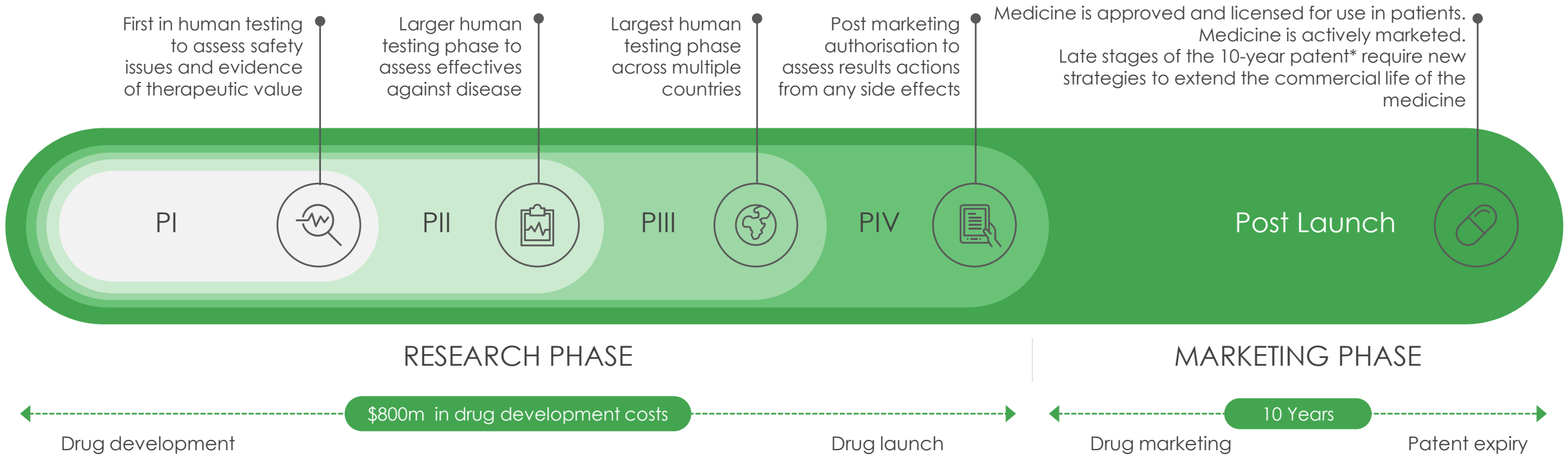
Note: the information in this document does not reflect any real live meeting and is an aggregated view on the profile and needs of each meeting type, as experienced by the authors.

Glossary of Terms

- **CPD** – Continuing Professional Development
- **External** – meetings for HCP's
- **HCP** – Healthcare Professional (E.g. Doctor) / Healthcare Provider
- **Industry** – healthcare and life science companies; medical device or pharmaceutical
- **Internal** – meetings for staff members of the healthcare company
- **KOL** – Key Opinion Leader (in this context a doctor, in the majority a HCP)
- **Meal caps** – the maximum cost applied to meals e.g. lunch and dinner, for meetings involving Healthcare Professionals and may vary from company to company
- **PCO** – Professional Congress Organiser
- **Protocol** - a document that describes how a clinical trial will be conducted; the objective(s), design, methodology, statistical considerations and overall organisation
- **ROO** – Return on Objectives
- **SAE** – Serious Adverse Event
- **Sponsors** – those responsible for the programme construction, content develop and total financial requirements of the meeting
- **Supported** – sole or multiple financial sponsors of a meeting or as contributors top content development
- **Strategic priority** – our view on the priority the meeting type plays in any strategic plan. All meetings and all interactions are of course important. Limited, for example, reflects the nature of a meeting as a supporting activity to a broad strategy, not one with limited outcomes
- **TOV** – Transfers of Value. Financial amounts which are recorded for reporting purposes including: travel, food & beverage, accommodation, registration & speaker fees
- **Venue Compliance Index** – a rating index provided by Healthcare-Venues to be launched in Q3, 2020

Planning Phases The Medicine Lifecycle

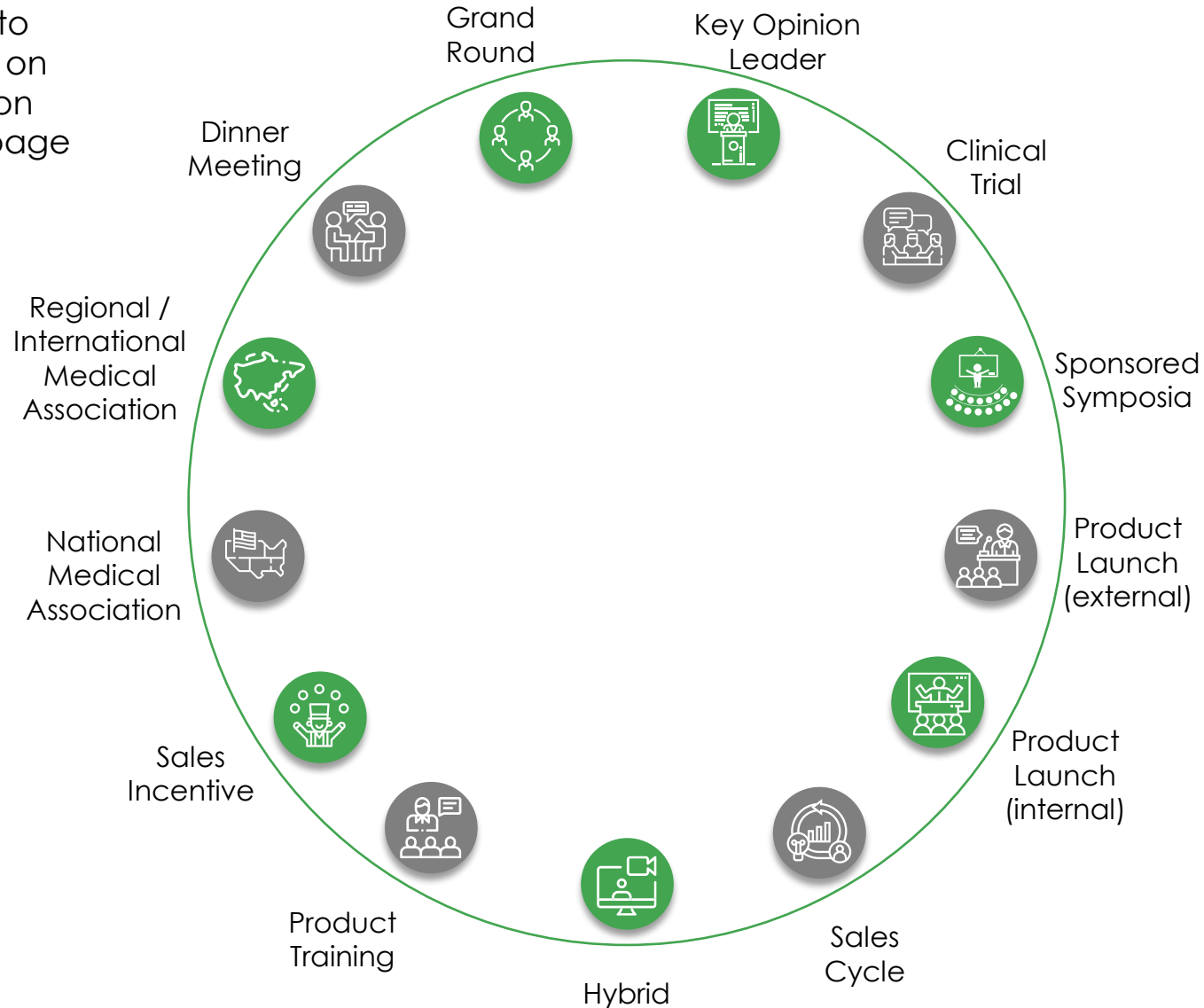
Every medicine follows a similar process in its clinical development and marketing. Meeting types throughout these phases change in terms of their objectives and logistical needs. These are outlined in the following pages. Understanding these changes in scope are key in being in front of best practise planning, anticipating needs, and delivering a tailored solution to each meeting type.





*Medicines are generally given an exclusivity patent of 10 years allowing them to recoup the investment in product development. Patents can be extended in special circumstances.

Meeting Types: Summary

Click on the graphic to jump to that meeting type. Then click on the Healthcare Venues logo on the top right to return to this page

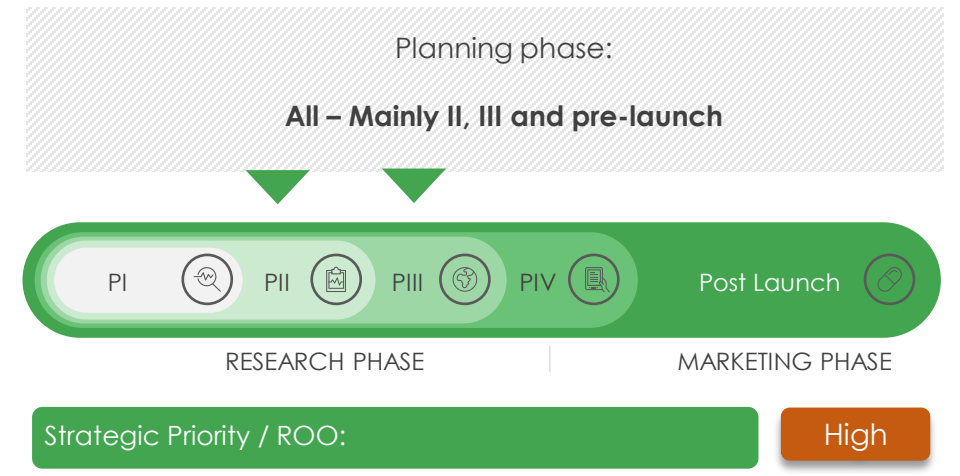


Key Opinion Leader (KOL) Meeting

Industry Involvement:	Supported
Number of HCP's / Participants:	Up to 30
Internal 	70%
External 	30%
# meeting Days:	1
Overnight:	Generally, no
Accommodation:	Internal team only



Venue Compliance Index Ratings: - -




MEETING OBJECTIVE:

- to interact and discuss insights, incidents of medicines in development
- to build and / or expand relationships between the KOL and corporate medical / marketers
- to enable healthcare and life science companies to develop research and marketing best practice
- most valuable meeting in terms of the working relationship between industry and KOL's


PLANNING CONSIDERATIONS:



- Ratio of internal to external will vary depending on type of KOL meeting
- Higher end venue in line with the seniority / expectations of the participants
- Often retreat style meeting with no distractions i.e. a remote location, but still close to an airport!
- Increasingly, but not exclusively, in a day meeting format. KOL participants are busy!
- Often audio recorded to produce accurate record of discussion (no stone / wooden floors!)
- Slide review room on 24 hour hold (KOL's not prepared to submit slides prior to meeting)
- Access to printers / photocopying throughout night / early am (programme finalised last minute)
- Working dinner seen as continuation of meeting (no distractions) in the case of overnight meetings.
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIP:

Often described as:

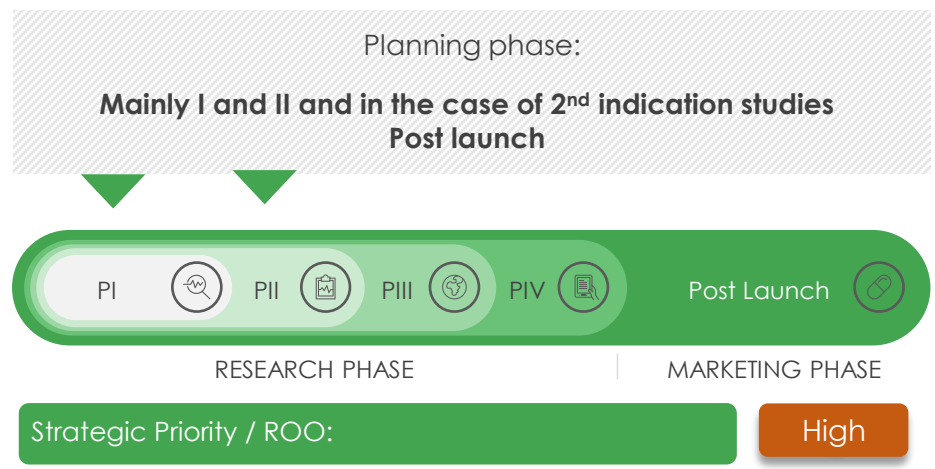
-  Advisory Board
-  Data Safety Management Board (DSMB)
-  Speaker Training

Clinical Trial Meeting

Industry Involvement:	Supported
Number of HCP's / Participants:	50-300
Internal 	10%
External 	90%
# meeting Days:	1.5
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings: - -



MEETING OBJECTIVE:

- Start up - to train monitors / investigators on how to conduct clinical trial
- Interim results - to update on the latest clinical trial results – often on-line in format
- Motivational – to kick start a flagging trial
- Final results announcement – likely to be on-line or attached to a medical congresses

PLANNING CONSIDERATIONS:

- Likely to have a brand/ theme to the meeting or the full study programme
- Easy access to keep travel costs and travel times as low as possible for multi-national participants
- High level technical production; staging, podium, top table, sound and lighting – possible recording
- Enhanced use of audience response technology
- 1-2 day meeting with one plenary session
- Possible breakouts by country language or specific discipline groups
- Space for simultaneous interpreting – materials sent to translators prior to meeting
- Exhibition space to display study materials e.g. packaging or SAE reporting
- Photocopy access and secure space to store study protocol / meeting binders, disposal solutions
- Higher level of postponement if trial data is not available
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIP:





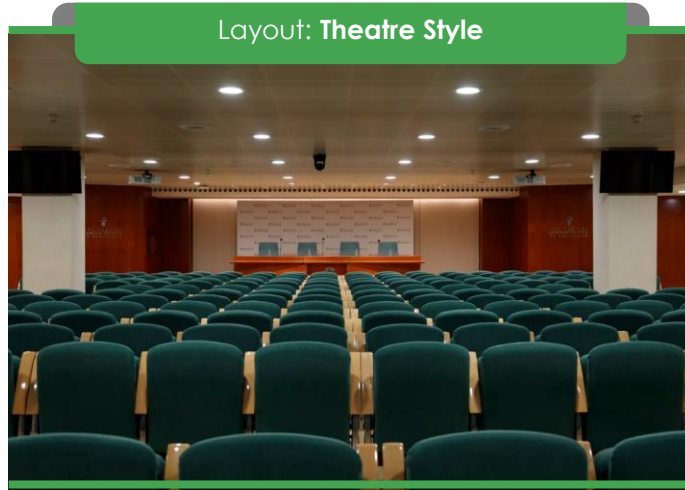
Clinical trial meetings require a high touch to manage as they are complex and use all the skills of meeting stakeholders, planners and partners




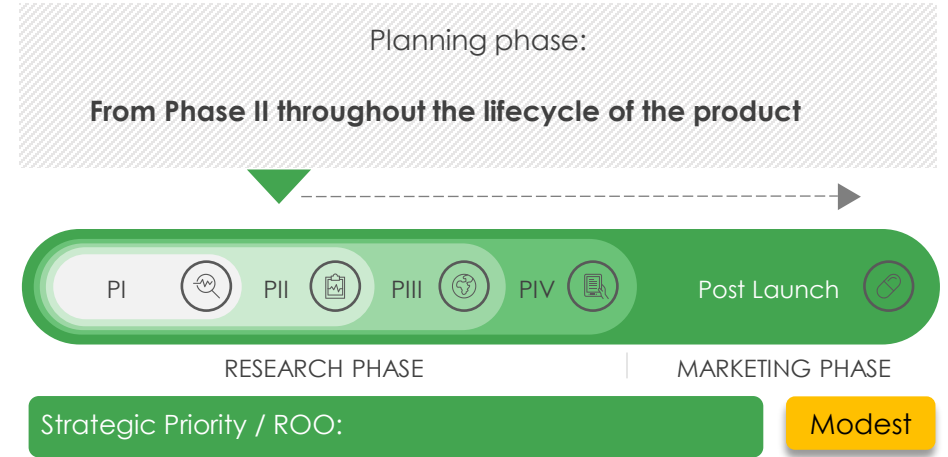
Attrition and cancellation terms need to be flexible as these meeting types are most liable to change based on the availability of study data – ready to share with participants

Sponsored Symposia during a Medical Congress

Industry Involvement:	Supported
Number of HCP's / Participants:	100+
Internal 	25%
External 	75%
# meeting Days:	1-2 hours
Overnight:	No
Accommodation:	Internal plus speakers



Venue Compliance Index Ratings: 



MEETING OBJECTIVE:



- Takes place during an international medical congress normally outside black-out times (i.e. not during the official congress programme).
- Part of global marketing plan to be associated with therapy area and to be seen to support high level scientific exchange
- Symposia are educational in nature, KOLs present data (often breaking news data) and participants have the rare opportunity to quiz global KOL's directly
- Content is generally not marketing / directly product related
- Opportunity for life science company representatives to build relationships with the HCPs

PLANNING CONSIDERATIONS:



- Participants are generated from HCP's sponsored to attend the congress by the symposia sponsor and by "marketing" the session through official congress channels
- Any accommodation is generally booked via official housing bureau
- Symposia can be off-site from the main congress venue in a hotel or other meeting space
- Some congresses may "buy-up" meeting space to manage which meetings are taking place where and when, to avoid dilution of participation at official congress sessions
- Sometimes, meeting venues are "allowed" to sell meeting space directly
- Conflicting meeting activities (within black-out times) must be approved by the Congress Organiser
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting

TOP TIP:



Relationships between medical societies, city convention bureaus and PCO's and the meetings supply chain, are critical to attract and deliver a connected city-wide meeting.





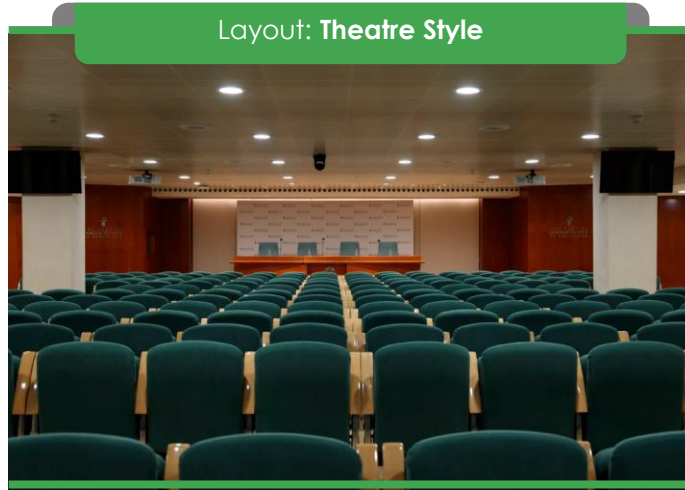
Hospitality pre, peri, post symposia should be modest as the meeting time is limited. Normally, 1-2 hours with limited time for additional network and discussions.





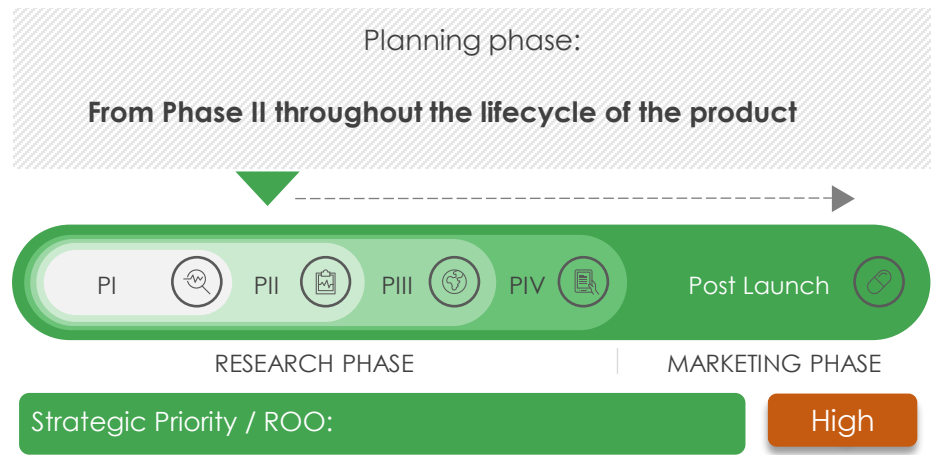
There are many people directly and indirectly involved in planning symposia. It is important to be clear on roles and responsibilities at the outset.

Standalone or Product Launch (Regional)

Industry Involvement:	Supported
Number of HCP's / Participants:	50-500+
Internal 	20%
External 	80%
# meeting Days:	2-3 days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings:  



MEETING OBJECTIVE:

- Generally used to support the successful launch of a product
- High touch meeting and networking interactions between KOL's, HCP's and sponsor's team
- Share product data, particularly clinical trial data
- Provide a robust environment to debate / discuss medical treatments
- To understand the needs of the HCP community



PLANNING CONSIDERATIONS:

- Airport or other hub locations are likely to be favoured
- New, cost efficient, destinations
- Multi-national / regional participants
- Congress centres may be used to support large scale plenary and breakout sessions
- Small scale exhibitions and interactive areas may be used
- High level technical production; staging, podium, top table, sound and lighting – possible recording
- Enhanced use of audience response technology
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIP:





Planning can be complex with a lot of "moving parts" and stakeholders at global and national levels





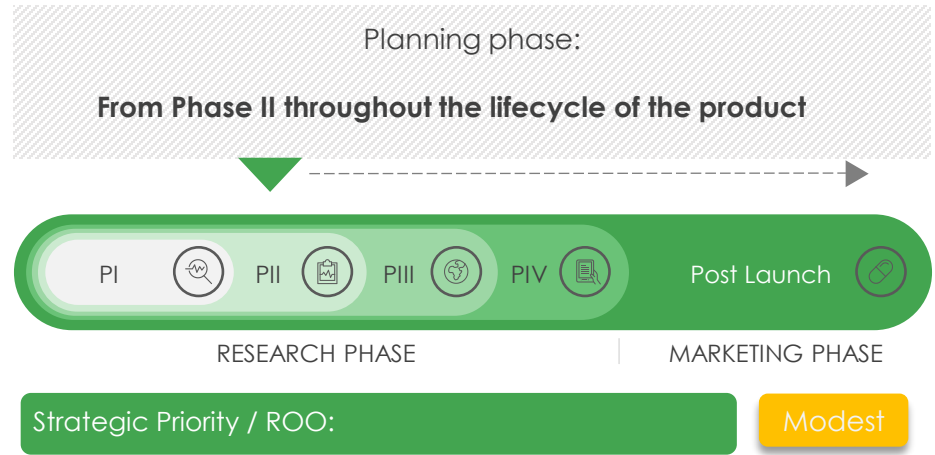
Understanding all the stakeholders and formalising responsibilities is critical for these complex projects

Standalone or Product Launch (Internal)

Industry Involvement:	Supported
Number of HCP's / Participants:	200-500
Internal 	100%
External 	Speakers
# meeting Days:	2-4 days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings:  



MEETING OBJECTIVE:

- Scheduled upon approval from the regulatory body in specific countries (multiple launches at national level often required either as a replacement or additional meeting)
- Targeted at medical and sales teams if, the organisation has retained a traditional sales team
- Used to educate and inform medical and sales teams
- Sales Cycle meetings "rally the sales force to make the launch of the new product successful"



PLANNING CONSIDERATIONS:



- Likely national in format, can be multi national in some circumstances e.g. consistent language
- Significant level of audio visual needs including video links from off-site locations
- Extensive use of in-meeting room, interactive technology
- 2-4 days in "motivational and interesting location with good access"
- Format often based on the "Congress model" of plenary, workshop and interactive spaces
- Plenary session and "multiple" breakout sessions
- High social component if no HCP's in attendance
- Meetings often multi use with quick turnaround times required
- Team building in both business and leisure formats likely to be included
- Often exclusive use / takeover the bar

TOP TIP:





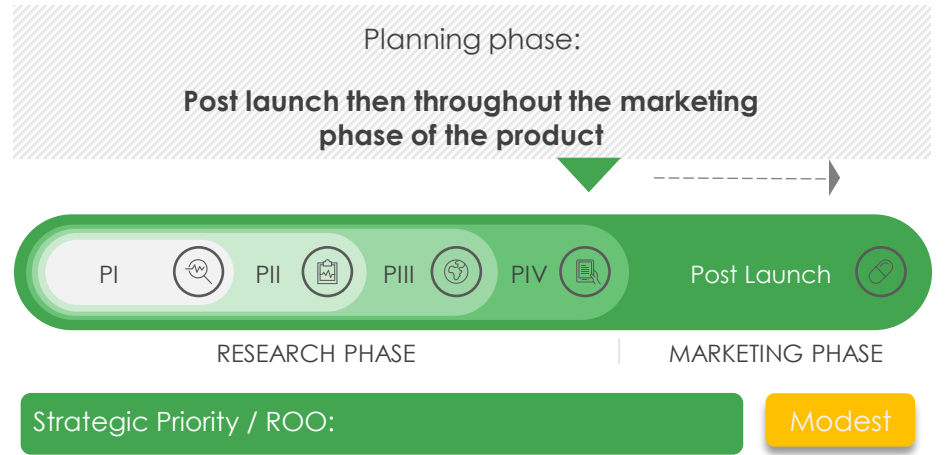
Meeting programmes can be organic with requests for new space requested as the meeting content is developed

Sales Cycle Meeting (Internal)

Industry Involvement:	Supported
Number of HCP's / Participants:	50-150
Internal 	100%
External 	Speakers
# meeting Days:	1-2 days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings:  






MEETING OBJECTIVE:

- Targeted at medical and sales teams if, the organisation has retained a traditional sales team
- Sales (focused) Cycle meetings “rally sales force to make the launch of a new product successful”
- Train sales and medical teams on product characteristics and the needs of HCPs
- Communicate and align global and national marketing and medical information campaigns
- Network, motivate and reward teams




PLANNING CONSIDERATIONS:

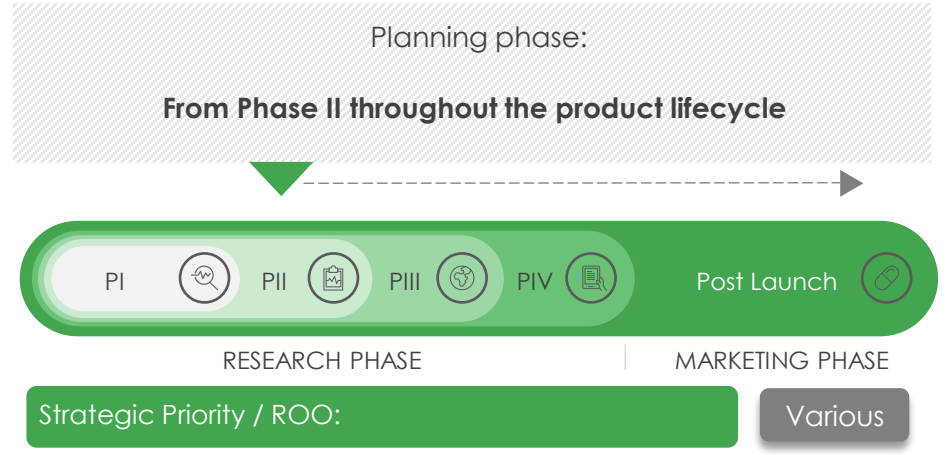
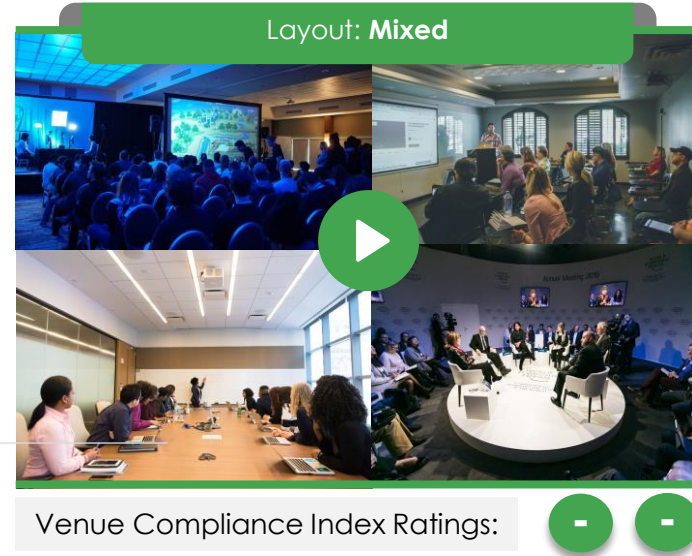
- Likely national in format, can be multi national in some circumstances e.g. consistent supporter
- Hands on meeting format, meaning extensive use of breakout rooms and informal meeting facilities such as lounges and outdoor spaces
- Workshop in format (if not a more formal launch meeting)
- Flexibility required to meal functions as sessions will likely be organic with overruns and last minute changes
- Use of outside evening meal locations or theming for meals held on property
- Leisure facilities useful for even limited down time programmes
- Innovative welcome; meeting room formats, use of in-meeting room technology, refreshment breaks, meals,

TOP TIP:

-  Meeting programmes can be organic with requests for new space requested as the meeting content is developed
-  Fitness, leisure and other creative “healthy” options can be part of these programmes

Hybrid Meeting (Internal or External)

Industry Involvement:	Sponsored & Supported
Number of HCP's / Participants:	100+ at multiple locations
Internal 	100%
External 	95%
# meeting Days:	Various
Overnight:	Yes
Accommodation:	Yes






**MEETING
 OBJECTIVE:**

- Create connected global and national perspectives
- Present therapy area and product data particularly, clinical trial data and national case studies
- Debate / discuss diagnosis and treatment guidelines
- Provide a platform for KOL's to share best clinical practise
- Reduce cost for face to face meetings with modest strategic or ROO outcomes



**PLANNING
 CONSIDERATIONS:**

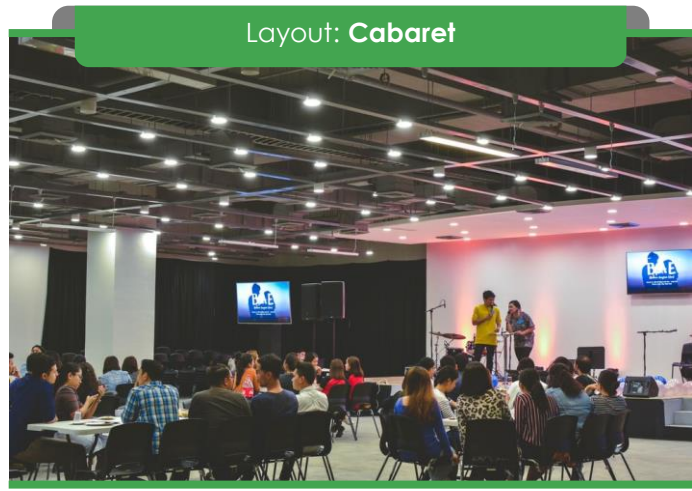
- High level of internet capability is required e.g. cabled internet connections for high res video links
- High level of audio visual production capability
- Noise interruptions; building work, public area overflow etc should be kept to a minimum as this can be amplified by hybrid meeting formats
- Use of single meeting venue brand selection can increase planning and cost efficiency
- Venue technical teams and or external suppliers should be involved in the project, working directly with client providers from the earliest stage
- Dependant on the size of each group and the nature of any "local" meeting, different meeting room set up styles will be used; from boardroom, cabaret to theatre style
- Some formats may require in the round (see image above) and lounge style set up's to facilitate conversations in preference to formal presentations
- Refreshments or meals may be required dependant on the length of the meeting (1-3 hours v over the course of days).
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.



TOP TIP:

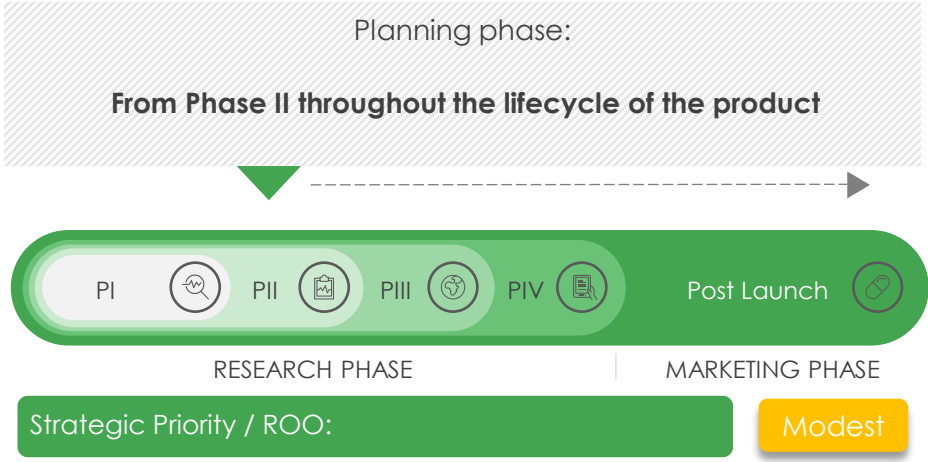
-  Any f2f meeting that might have off site digital contributions could be considered a hybrid meeting
-  Multi hub meetings mean individual meetings integrating with a hub location
-  Not to be confused with web meetings undertaken via platform such as ON24, Zoom etc.

Product Training (External)

Industry Involvement:	Supported
Number of HCP's / Participants:	10-150+
Internal 	100%
External 	Speakers
# meeting Days:	1-3 days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings:  



MEETING OBJECTIVE:




- Train and inform on the characteristics of medical products
- Develop understanding of HCP requirements
- Provide and create support materials
- Provide tools to enable cascading of best practise to others, beyond the meeting
- Build community to create continuous engagement





PLANNING CONSIDERATIONS:

- Likely national in format, can be multi national in some circumstances
- Significant use of technology often in a workshop format – some videos and virtual components can, on occasion, be integrated into the meeting format
- Likely to incorporate workshops / breakouts and the use of the meeting room in advanced learning formats. e.g. poster display – breakouts within plenary spaces
- Normally cabaret style in format
- Meetings will be organic in design so likely to slip in terms of timings meaning room refresh, meals and finish times need to be flexible.
- Working lunches likely with on-demand refreshments breaks
- Some participants may require approval to attend the meeting- this can mean the need for flexible attrition rates to reflect the needs of these delegations
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIP:

-  These meetings are organic in design. Expect changes to timings and format late into the planning process
-  Meal functions are likely to be flexible
-  Easy communications to access the venue preferred

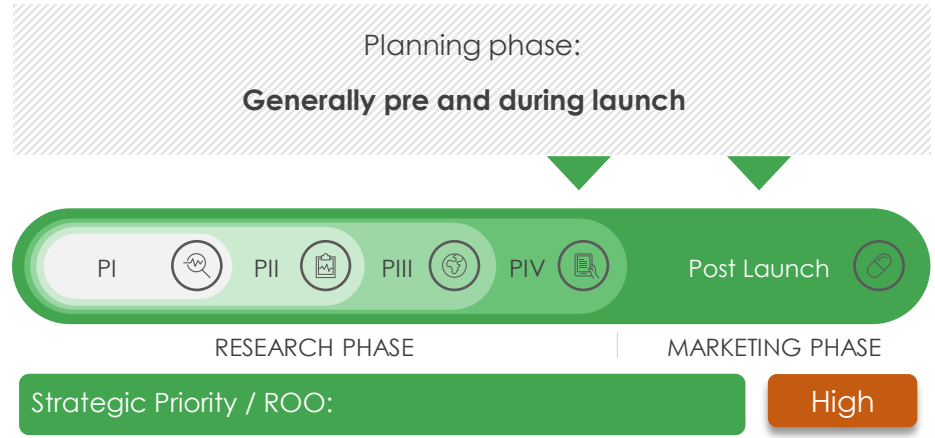
Sales Incentive (Internal)

Industry Involvement:	Supported
Number of HCP's / Participants:	20+
Internal 	100%
External 	n/a
# meeting Days:	2-3 days
Overnight:	Yes
Accommodation:	Yes

Layout: **Sales Incentive**



Venue Compliance Index Ratings: - -



MEETING OBJECTIVE: 

- To reward performance
- To generate team bonding and purpose



PLANNING CONSIDERATIONS: 

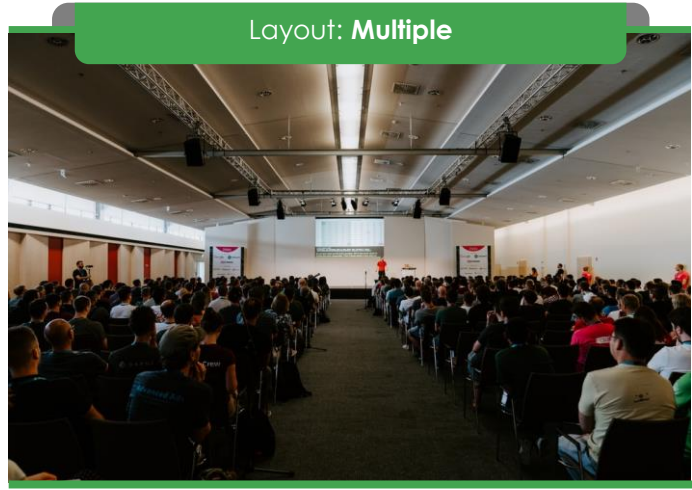
- Mixture of business meetings (on occasion), team building, exciting activities and social programmes designed around uniqueness and exclusivity
- Meeting formats likely to be informal; lounge style, u-shape or cabaret
- Usually outsourced to 3rd party incentive programme experts
- Physical travel has in many occasions been replaced by cash or voucher based schemes – certainly for healthcare sector meetings where the size of salesforces have reduced over time with a focus on medical information sharing over sales focused interactions with HCPs.

TOP TIPS:

-  High-end hotels, lodges and unusual venues preferred
-  Food will be a feature of the programme
-  Hard to access locations preferred
-  Experience is key to the modern incentive.

National Medical Association (External)

Industry Involvement:	Supported
Number of HCP's / Participants:	200-300+
Internal 	90%
External 	10%
# meeting Days:	2-3 days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings: - -

Planning phase:
**Pre, post and parallel to medical development
focused on broad and targeted therapy area topics**



Strategic Priority / ROO: Limited



MEETING OBJECTIVE:

- To discuss a range of aspects linked to the therapy area which is the focus of the association
- Often, but not exclusively, a focus on national factors
- Provide a networking platform for members
- Discuss scientific developments, journals and papers to educate members
- Deliver education (often as part of CPD) to members
- Work with industry supporters to integrate exhibit, symposia and poster content into the programme



PLANNING CONSIDERATIONS:

- Attractive but mostly accessible location with extensive parking
- Plenary session focus often for large numbers, theatre style
- Additional rooms : Workshops and smaller style committee meetings and VIP/speaker rooms
- Exhibit and poster areas
- Social dinner in different room or outside of the venue
- Drinks receptions and welcome activities as part of the networking programme
- Set up time and 24 hour hold of meeting space and exhibit/poster areas
- Corporate sponsorship of HCP delegations is less frequent than regional / global congresses
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIPS:



Hotel bookings are more likely to be decentralised allowing direct sales from venues to individuals and groups





National congresses are increasingly important in the overall conversation about medicine – mostly through research and leading speakers





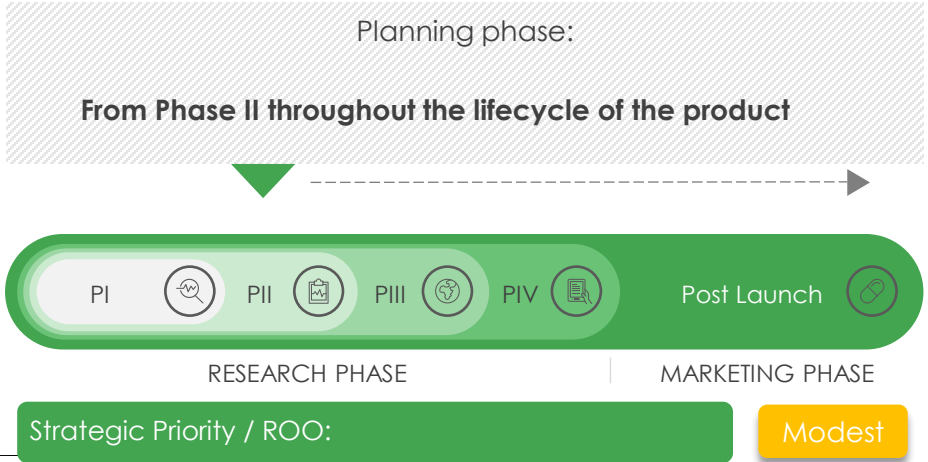
National congresses as they grow, certainly where travel restrictions apply, need citywide approaches to attract and develop solutions

Regional / Global Medical Association (External)

Industry Involvement:	Supported
Number of HCP's / Participants:	500 -15k+
Internal 	20%
External 	80%
# meeting Days:	3-4+ days
Overnight:	Yes
Accommodation:	Yes



Venue Compliance Index Ratings:  






MEETING OBJECTIVE:

- To discuss a range of aspects linked to the therapy area which is the focus of the association
- Provide a networking platform for members
- Discuss scientific developments, journals and papers to educate members
- Deliver education (often as part of CPD) to members
- Work with industry supporters to integrate exhibit, symposia and poster content into the programme




PLANNING CONSIDERATIONS:

- Attractive but mostly accessible location with easy travel a focus
- Plenary sessions, often for large numbers, theatre style
- Additional rooms : Workshops and smaller style committee meetings and VIP/speaker rooms
- Exhibit and poster areas
- Member only social programmes
- Large scale off-site dinners
- Cocktail receptions and welcome activities as part of the networking programme
- Set up time and multiple day hold of meeting space and exhibit/poster areas
- Corporate sponsorship of HCP delegations is more frequent than national congresses
- Use of pre, peri and post virtual components increasing
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIPS:



-  Planning is centralised in terms of accommodation, meeting space and logistical components
-  High degree of citywide approaches required to attract and deliver solutions to congresses

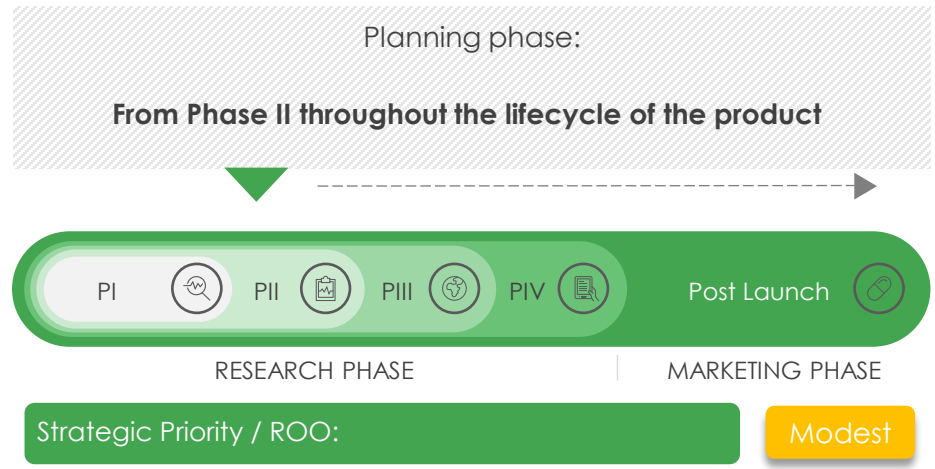
Dinner Meetings (External)

Industry Involvement:	Sponsored
Number of HCP's / Participants:	20-50+
Internal 	5%
External 	95%
# meeting Days:	3-4 hours
Overnight:	No
Accommodation:	No



Layout: **Cabaret**

Venue Compliance Index Ratings:  






**MEETING
OBJECTIVE:**

- Train and inform on the characteristics of medical products
- Develop and share best practise
- Develop understanding of HCP requirements
- Share breaking news data quickly




**PLANNING
CONSIDERATIONS:**

- Workshop style with limited use of staging and other high technology formats
- Moderate use of in-meeting room participant engagement technology
- Privacy is key; no slides or materials should be seen by members of the public
- Timings are key, as presentations might take place between courses
- Easy parking will support those HCP's travelling from work at the last minute
- **COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.



TOP TIPS:

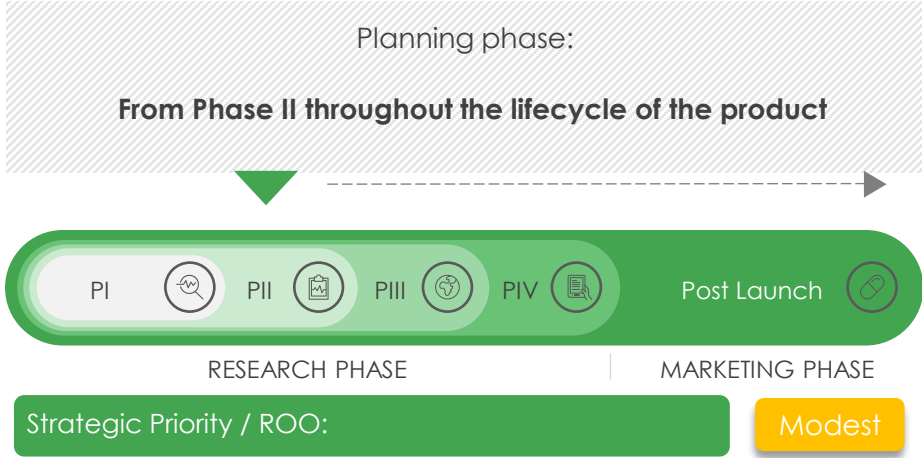
-  Security is critical with total privacy when medical information is being shared
-  Timing is everything to ensure that the balance between eating and meeting is effective.

Grand Rounds (External)

Industry Involvement:	Supported
Number of HCP's / Participants:	20-50+
Internal 	5%
External 	95%
# meeting Days:	3-4 hours
Overnight:	No
Accommodation:	No



Venue Compliance Index Ratings:  



MEETING OBJECTIVE: 

- HCP's discuss the clinical cases of patient/s
- Outcome is broadly knowledge development and specifically training as part of formal physician training programmes
- Communicate research data

PLANNING CONSIDERATIONS: 

- Workshop style with limited use of staging and other high technology formats
- Moderate use of in-meeting room participant engagement technology
- Often held within medical locations; hospitals / surgery's and universities if facilities are available and in-line with the needs of the meeting
- Can be solely funded and arranged by medical establishments such as hospitals
- Meeting venues used when supported by healthcare and life science companies
- COMPLIANCE:** Healthcare company policy (where available) on destination & venue selection, meal caps, travel, gifts and partner policies plus, TOV requirements, to be applied to this meeting.

TOP TIPS:

-  Popular in the US
-  Often known as rounds, focused on individual physicians and teams with Grand Rounds being open to the broader medical community

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