

# CERTIFIED MEETING PROFESSIONAL (CMP) EXAMINATION BLUEPRINT

*(Effective January 2007)*

The Certified Meeting Professional (CMP) program aims to increase the professionalism of meeting management professionals in all sectors of the industry. To earn the CMP credential an individual must meet specific application requirements and pass a rigorous examination.

The examination is composed of 165 multiple choice questions based on the CMP Blueprint and are selected from the CMP "Item Bank." Each examination offered is made up of a different selection from the bank of questions. All CMP examination questions are written by and reviewed on a regular basis by current CMPs at the annual CMP Conclave.

Periodically, a study is conducted to make sure that the CMP examination is current. Meeting professionals are surveyed to help evaluate the level of knowledge and skills that are expected within the profession. A survey of job tasks was given to meeting professionals as part of the analysis process. The CMP Blueprint was developed from their responses, based on how relevant these job tasks were to the daily practice of meeting management. The CMP examination contains questions covering the variety of functions a meeting planner must perform based on the CMP Blueprint.

The knowledge base is categorized into 5 domain areas, 49 tasks and 230 knowledge topics. The five domains identify major content areas which compose the exam, with an indication (percentage in parenthesis next to each domain) of the amount of the exam that will be devoted to that domain. The new Blueprint will take affect beginning with the January 2007 CMP examination.

## **I. STRATEGIC EVENT PLANNING PROCESS (24%)**

- A. Determining the purpose of the meeting (event) [4-5]**
  - 1 Goals and objectives of the host organization
  - 2 Goals and objectives of the meeting/event
- B. Identifying relationship of meeting (event) to organizational strategy [2-3]**
  - 1 Working with organization staff and/or volunteers (unpaid staff)
  - 2 Whether the event is being produced by the organization itself or by a third party
  - 3 Strategic partnerships and alliances
  - 4 Role of the event in the event host's financial picture (e.g., the budgetary philosophy of the organization)
- C. Identifying stakeholder needs, expectations, and desired outcomes [3-4]**

Characteristics and demographics of meeting participants, including whether they are

  - 1 required to attend or not
  - 2 Market analysis
  - 3 Awareness of diversity issues (e.g., accessibility, holidays, food preferences)
  - 4 Roles and responsibilities of stakeholders
- D. Preparing program outline (e.g., topics, content, potential speakers) [1-2]**
  - 1 Characteristics of types of meetings (events)
  - 2 Program formats (e.g., colloquium, seminar, workshop)
  - 3 Adult learning principles
  - 4 Meeting (event) agenda
- E. Obtaining and analyzing statistics and historical information related to meetings (events) [1-2]**
  - 1 Methodology for data collection
  - 2 Quantitative data
  - 3 Qualitative data
- F. Design program details that meet needs of participants [2-3]**
  - 1 Learning styles
  - 2 Needs assessment
- G. Identify successful criteria for evaluation of meeting (event) [2-3]**

Who defines success (e.g., board of directors, customers, conference coordinator,

  - 1 exhibitors, suppliers, attendees)
  - 2 How to evaluate

- 3 What to evaluate, including goals and objectives of the meeting (event)
- 4 When to evaluate
- 5 Return on investment (ROI)
- H. Preparing comprehensive timeline (project plan) for meeting (event) [1-2]**
  - 1 Steps to consider (planning timeline, event timeline, post-event timeline)
  - 2 Required time for each step (lead time)
- I. Preparing meeting (event) specifications [2-3]**
  - 1 Meeting specifications (e.g., dates, times, number and type of guest rooms, meeting rooms)
  - 2 How to use a specifications guidebook
- J. Developing marketing plan for meeting (event) [2-3]**
  - 1 Integrated marketing plan components (e.g., advertising, direct mail brochures, publicity, sponsorship)
  - 2 Market research questions
- K. Assessing technology requirements [1-2]**
  - 1 Technology resources (e.g., using the Internet for research, communication, e-commerce) Hardware (e.g., PCs, servers, printers, digital cameras) and tools (e.g., cell phones, two-way radios, fax machines, pagers)
  - 2 Software applications (e.g., site selection, rating forms, match-making programs, audience response, database management)
  - 3 Security and safety concerns (e.g., firewalls, password protection, back-up technology)
- L. Creating marketing materials for the meeting (event) [1-2]**
  - 1 Content for marketing materials
  - 2 Production of marketing materials
- M. Creating, leading and managing project team [2-3]**
  - 1 Selection, identification, formulation
  - 2 Delegation
  - 3 Communication skills (written, oral, visual)
  - 4 Interpersonal skills

## **II. FINANCIAL AND CONTRACT MANAGEMENT**

**(20%)**

- A. Identifying ancillary revenue sources and/or cost savings opportunities [2-3]**
  - 1 Sponsors
  - 2 Advertising
  - 3 Exhibitors
  - 4 In-kind, barter, tradeout
  - 5 Rebate and/or assessment
- B. Developing budget for meeting (event) [5-6]**
  - 1 Currency conversions
  - 2 Budgeting methods (e.g., zero-based budget)
  - 3 Forecasting of revenues and expenses
  - 4 Cost categories (e.g., fixed, variable, direct, indirect)
  - 5 Accounting fundamentals (e.g., balance sheet, income statement)
  - 6 Data that will support the budget (e.g., past event information, number of participants)
- C. Determining fees for participation, if any [2-3]**
  - 1 Break-even analysis
  - 2 Costs per person
  - 3 Fixed and variable costs
  - 4 Perceived value and/or return on investment
- D. Conducting Request for Proposals (RFP) process [3-4]**
  - 1 Components of an RFP (e.g., information to give to a facility) Criteria to determine the individuals within an organization that should review responses received
  - 2 Process for conducting the review
  - 3 Criteria for selection of the supplier
  - 4 Techniques for obtaining bids
- E. Negotiating contracts [4-5]**
  - 1 Components of and terminology of contracts including fine print and references to other

- documents
- 2 Value of program components; opportunities for possible negotiation
- 3 Contract agreements (e.g., terms, conditions)
- 4 Legal implications (e.g., financial, liability, risk, attrition; Sarbanes Oxley equivalents; privacy laws)
- 5 Methods of dispute resolution
- F. Securing appropriate types and amounts of insurance [2-3]**
  - 1 Types of insurance (e.g. liquor liability, event cancellation, general liability, fire/legal liability)
- G. Managing resources within budgeted guidelines [3-4]**
  - 1 Cost containment
  - 2 Room pick-up
  - 3 Modification of the budget plan
  - 4 Expenditure approval process
- H. Ensuring completion of the payment and/or billing processes [2-3]**
  - 1 Billing timetable
  - 2 Gratuities/tips/service charges
  - 3 Reconciliation of master bill
  - 4 Processing of invoices
  - 5 Taxes (e.g., VAT, tax exempt status)

### **III. FACILITIES AND SERVICES**

**(18%)**

- A. Determining the appropriate geographic location for the meeting (event) [3-4]**
  - 1 Peak and off-seasons for geographic areas, domestic and international
  - 2 Holiday calendars and seasonality considerations
  - 3 Competing events
  - 4 Support services from the Convention and Visitors Bureau/Tourism Board
  - 5 Special planning considerations for international meetings
  - 6 Who attendees are their demographics
  - 7 Impact of transportation costs
  - 8 Accessibility by various types of transportation (e.g., group, air)
  - 9 Infrastructure of location (e.g., public transportation, taxis)
  - 10 Cost factors that influence the decision (e.g., transportation costs)
  - 11 Tying the location to the goals and objectives of the meeting
  - 12 Union considerations – *In North America Only*
  - 13 Internet resources
- B. Determining the appropriate venue for the meeting (event) (e.g., hotel, convention center, conference center) [3-4]**
  - 1 Tying the venue/facility to the goals and objectives of the meeting
  - 2 Differences among types of venues/facilities
  - 3 Venue/facility services
  - 4 Union considerations – *In North America Only*
  - 5 Accessibility issues
  - 6 Internet resources
- C. Identify the types of services required for a successful meeting (event) [3-4]**
  - 1 Registration staff
  - 2 Exhibition services contractor
  - 3 Decorator
  - 4 Audiovisual (A/V)
  - 5 Transportation
  - 6 Security
  - 7 Catering
  - 8 Guest programs
  - 9 Special events
  - 10 Destination management company (DMC)
  - 11 Recreational activities
  - 12 Exclusive vendors/tying
  - 13 Production companies

- 14 Entertainment and/or speakers
- Conducting site inspection to determine viability of location and venue including potential offsite activities [2-3]**
- D. offsite activities [2-3]**
  - 1 Site inspection process
  - 2 Convention and Visitor Bureau/Tourism Board
  - 3 Ethical business practices
- E. Conducting a pre-meeting (event) briefing (pre-con) with suppliers and facility providers [2-3]**
  - 1 Identification of briefing participants
  - 2 Topics to be covered (e.g., expectations, VIPs, Banquet Event Order [BEO] changes, program overview)
  - 3 Review of event specifications guide
- F. Coordinating security procedures with venues [2-3]**
  - 1 Crisis management plan
  - 2 Emergency plan
  - 3 Special needs (e.g., protestors, VIPs)
- G. Planning, ordering, and overseeing technology requirements for the meeting (event) [2-3]**
  - 1 Hardware and software requirements
  - 2 Web-based reservation tools
  - 3 Web-based conferencing tools and techniques
  - 4 Audience response systems
  - 5 Audiovisual (A/V) including Wireless Internet audience response systems
  - 6 Electrical power requirements
- H. Conducting a post-meeting (event) review (post-con) with suppliers and facility providers [2-3]**
  - 1 Identification of review participants
  - 2 Topics to be covered (e.g., final billing, lessons learned, recommendations)

#### **IV. LOGISTICS**

**(20%)**

- A. Establishing invitation and/or registration procedures for the meeting (event) [2-3]**
  - 1 Pre-registration delivery options (e.g., fax, phone, on-line, paper)
  - 2 On-site registration operations
  - 3 Registration software options
  - 4 Special requirements of attendees (e.g., accessibility, allergies, special needs)
  - 5 Pre-selection of specific sessions and functions by attendees
  - 6 Payment procedures and/or options
  - 7 Emergency contact information from attendees
  - 8 Cancellation and no-show penalties (e.g., credit issues)
  - 9 Attendee policy
- B. Assessing risk management issues in order to determine needed insurance and operations [2-3]**
  - 1 Internal communications plan
  - 2 Risk management issues (e.g., fire safety, emergency action plan, serving alcohol)
- C. Determining exhibitor booth assignments and setup process for exhibits [2-3]**
  - 1 Exhibit prospectus
  - 2 Service contractors
  - 3 Union guidelines – *In North America Only*
  - 4 Lead retrieval systems
  - 5 Space usage requirements
  - 6 Booth and/or stand types
  - 7 Exhibit service kit
  - 8 Booth assignment techniques (e.g., first-come-first-serve, priority points)
  - 9 Security
  - 10 Physical setup and dismantle
  - 11 Exhibit rules
- D. Securing transportation arrangements for the meeting (event) [1-2]**
  - 1 Tour and travel agency services
  - 2 Official service providers (e.g., airline, car rental, shuttles, limos)  
Destination management company (DMC) and/or professional conference organizer (PCO)
  - 3 (PCO)
- E. Managing the housing reservation process [2-3]**

- 1 Incentives for booking the block
  - 2 Reservation review date
  - 3 Cut-off date
  - 4 Rooming list
  - 5 Third-party housing (e.g., housing bureau, housing services)
  - 6 Housing form
  - 7 Self-made reservations
  - 8 Room guarantees
  - 9 Attrition clause
  - 10 Tracking housing pick-up reports including audit and verification
  - 11 Technology-based tools to manage housing
- F. Identifying security measures required for each facility and/or meeting (event) [2-3]**  
Level of security associated with meeting (event), attendees, and/or sponsoring organizations
- 1 organizations
- G. Communicating travel arrangements for participants to get to and from an event site [1-2]**
- 1 Group policies
  - 2 Staff travel
  - 3 Ground transportation options for attendees
  - 4 VIP travel
  - 5 Cut-off dates
  - 6 Discounts
- H. Managing all aspects of food and beverage functions [2-3]**
- 1 Service styles (e.g., American service, English service, butler style)
  - 2 Menu planning
  - 3 Types of functions (e.g., buffet, breaks)
  - 4 Types of beverage service (e.g., cash bar, combination bar)
  - 5 Recycling including for non-human consumption; handling of containers
  - 6 Room setup
  - 7 Special dietary needs (e.g., kosher, vegan)
  - 8 Banquet Event Orders(BEOs)
  - 9 Guarantees
  - 10 Food trends
- I. Preparing and reviewing housing reports in a timely manner [1-2]**
- 1 Components of a housing report (e.g., types of rooms blocked, number of meeting rooms used, overall attendance)
  - 2 Timing of a housing report
  - 3 Housing pickup report
  - 4 Attrition clause
- Determining the setup for function rooms including seating and audiovisual (A/V) [2-3]**
- J. requirements**
- 1 Meeting space assignments
  - 2 Setup configurations (e.g., chairs, tables, audiovisual (A/V), staging)
  - 3 Function room space requirements
  - 4 Food and beverage function seating requirements (e.g., how many chairs)
  - 5 Seating arrangements (e.g., protocol)
  - 6 Types of tables and chairs
  - 7 Accessibility requirements
  - 8 Equipment requirements in relationship to room setup (e.g., audiovisual (A/V), sound)
- K. Coordinating the shipping of materials to and from the meeting (event) site [1-2]**
- 1 Freight carriers/freight forwarders
  - 2 Customs brokers
  - 3 Private couriers
  - 4 Common carriers
  - 5 Truckload or less-than-truckload (LTL) – *refer to APEX Glossary*
  - 6 Packing lists
  - 7 Labeling and packing
  - 8 Tracking and tracing
- L. Tracking and recording continuing education credits earned [1-2]**

- 1 Certificate of attendance
- 2 CEU/CLE/CME policies and procedures
- 3 Attendance tracking software

## **V. PROGRAM**

**(18%)**

- A. Reviewing goals of meeting and determine details of program to meet those goals [4-5]**
  - 1 Advisory committees
  - 2 Supplier feedback
  - 3 Client and/or sponsor feedback
  - 4 Attendee feedback
  - 5 History of previous meetings
- B. Securing speakers [3-4]**
  - 1 Types of speakers
  - 2 Speakers bureaus
  - 3 Knowledge experts
  - 4 Industry trends
- C. Manage the contractual relationship with speakers [2-3]**
  - 1 Intellectual property rights (e.g., audio tapes, handouts reprinted in proceedings)
  - 2 Marketing speaker products (e.g., books, tapes, recordings)
  - 3 Contractual fulfillment
  - 4 Speaker ready room
- D. Securing entertainment for the meeting (event) (e.g., music, artists) [2-3]**
  - 1 How to deal with agents and promoters
  - 2 Production companies
  - 3 Music licensing
  - 4 Service providers
  - 5 Contractual fulfillment
  - 6 Rehearsals
  - 7 Green rooms
- E. Determining food and beverage arrangements that support program objectives [3-4]**
  - 1 What meals and breaks that need to be covered
  - 2 How to determine quantities required
  - 3 Costs associated with food and beverages
  - 4 Food and beverage formulas (e.g., drinks per person)
- Arranging ancillary programs in conjunction with the meeting (event) including pre-and post-meeting activities [2-3]**
- F. post-meeting activities [2-3]**
  - 1 Sightseeing tour programs
  - 2 Educational seminars
  - 3 Guest programs
  - 4 Children's programs including day care
  - 5 Liability insurance
- G. Determining audiovisual (A/V) needs [3-4]**
  - 1 Cost of audiovisual (A/V)
  - 2 Audiovisual (A/V) formulas (e.g., where to place a screen)
  - 3 Types of audiovisual (A/V) equipment
  - 4 How to determine size and/or quantities based on room size and setup
  - 5 Audiovisual (A/V) equipment terminology (e.g., brand names used in place of generic terms)
  - 6 Technology capabilities
- H. Arranging media and public relation activities for the meeting (event) [1-2]**
  - 1 Industry and local media
  - 2 Press releases
  - 3 Press conferences
  - 4 Press room

