

# CTSM Candidate Portfolio

A Case Study on the  
Academy Resource Center

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# I: Vital Statistics

## PERSONAL PROFILE

My love for marketing and advertising became evident in eighth grade when, for my final year-end project, I created a campaign for an imaginary cereal, complete with packaging, print ads and mailers, and TV and radio commercials. I pursued that love by enrolling as a journalism major, advertising emphasis at the University of Oregon. I finished my degree at Portland State University, majoring in English literature and minoring in professional writing (they did not offer a journalism degree). I've continued to educate myself over the years by earning ESL/literacy teaching certificates and a Core Curriculum Program Certificate in public relations/advertising/marketing (American Medical Writers Association); by taking a brand strategy workshop with Andy Spade (at Kate Spade); and by attending various courses and conferences such as Exhibitor*Live* and Exhibitor*FastTrak*.

My first taste of events and exhibits was at the U.S. headquarters of Dr. Martens, the U.K. footwear and apparel brand. As a sales and marketing coordinator, I stepped in for overwhelmed staff and organized the rapidly-approaching U.S. annual sales and marketing meeting and accompanying fashion show. I was hooked! I was soon promoted to public relations and promotions coordinator, then manager, and helped build our brand in the U.S. through PR events, concert sponsorships, trade shows, and more.

After some time away to teach English in Japan and work in educational sales in New York, I returned to the West Coast, where I landed a job at my current company, the American Academy of Ophthalmology. For five and a half years I worked as the promotions coordinator in our Meetings & Exhibits Division, marketing the Academy's own annual meeting and exhibition as the premier ophthalmic educational event to 45,000 potential professional attendees and 500+ exhibiting companies. I managed meeting publication production, advertising, website content, freight logistics, and services such as lead retrieval and photography.

In 2011 I was promoted to my dream job at the Academy: marketing manager. In this position, I drive the strategy and execution of integrated marketing campaigns for the Academy's annual meeting and exhibition, plus other Academy meetings, trade shows, promotional initiatives, and corporate projects. I'm also a core member of the five-person Brand Team, which began a corporate rebranding process in 2013 and is now in the implementation stage. One of my favorite components of my job, which I am focusing on in this portfolio, is the Academy Resource Center. This is our 110' x 110' booth at the Academy's annual meeting and exhibition, where almost every department is represented and where attendees can purchase products, learn about our services, meet with Academy staff, or just relax.

I work with a wide variety of people at the Academy, but most closely with my direct-report, a marketing communications specialist (Reina); my supervisor, the director of marketing (Brandi); the VP of Communications & Marketing (Renaldo); the VP of Meetings & Exhibits (Debra); and the promotions manager, meetings & exhibits (Nicole). I also interact regularly with other members of the Meetings &

Exhibits and Communications & Marketing Divisions, Brand & Creative, Customer Service, Member Services, Global Alliances, Clinical Education, the American Academy of Ophthalmic Executives (AAOE, our practice management department), the Foundation, Finance, and IT.

## COMPANY PROFILE

The American Academy of Ophthalmology ([www.aao.org](http://www.aao.org)) is the world's largest association of eye physicians and surgeons. A global community of 32,000 medical doctors, we protect sight and empower lives by setting the standards for ophthalmic education and advocating for our patients and the public. We innovate to advance our profession and to ensure the delivery of the highest-quality eye care.

### A Brief History of the American Academy of Ophthalmology

Dr. Hal Lovelace Foster (1858–1946) recognized that the growing field of American ophthalmology required a space for physicians to congregate and share ideas and innovations. In 1896, at the dawn of the Progressive Era, Dr. Foster invited more than 500 ophthalmologists and otolaryngologists to participate in a meeting in Kansas City, Missouri. About 50 physicians from 27 states showed up at what was to be the first annual meeting of the Western Ophthalmological, Laryngological, and Rhinological Association. The meeting lasted for two days and included a program of scientific papers. Dr. Foster estimated that the entire event cost \$400, which he paid entirely from his own funds. He said of that first meeting, "The money I spent in calling those specialists together was the best investment I ever made."



Over the next several decades, the association acquired a broader base and scope, eventually growing into the largest medical specialty society in the country. Members began to study and recommend plans to standardize graduate education in both ophthalmology and otolaryngology. In 1916, in cooperation with the American Ophthalmological Society and the American Medical Association, the American Board of Ophthalmology (ABO) was established. The ABO was the first such medical specialty board in the United States. Formal post-graduate instruction was introduced to the annual meeting shortly thereafter, and is a cornerstone of continuing medical education (CME) today.

By the 1970s, the size of the association had grown a great deal, making it difficult to hold joint meetings. As a result, in 1979, the Academy split into two new organizations. One is today's American Academy of Ophthalmology (AAO/"The Academy"), headquartered in San Francisco, California (with a handful of staff in Washington, DC). The other is the American Academy of Otolaryngology, headquartered in Alexandria, Virginia.

*Sources: American Academy of Ophthalmology ([www.aao.org/about/who-we-are/overview](http://www.aao.org/about/who-we-are/overview)); American Academy of Ophthalmology Museum of Vision ([www.museumofvision.org/about/history?key=7](http://www.museumofvision.org/about/history?key=7)); and Pioneering Specialists: A History of the American Academy of Ophthalmology and Otolaryngology, by Sharon A. Bryan ([www.aao.org/about/history](http://www.aao.org/about/history)). All accessed 5/03/2015.*

### The Academy Today

In his address at that first meeting in 1896, Dr. Foster noted, "I have called you here to organize an Ophthalmological, Otological and Laryngological Association. The little acorn I plant here today will never satisfy me until like an oak, it grows and spreads all over the United States." Indeed, Dr. Foster

would be proud to know that the organization he started has grown and flourished. Today, Academy membership is 32,000 strong, about a quarter of that being international. 93% of all U.S. ophthalmologists are members – one of the highest percentages of membership among all specialty medical associations.

Over 120 years of operation, the Academy has expanded resources far beyond the annual meeting. With almost 200 employees, the Academy is the largest specialty medical association on the West Coast and one of the largest non-profit organizations in San Francisco. To enable our members to meet their educational and quality-of-care goals, Academy staff provide a wide variety of programs, products and services to ophthalmologists, their staff, and the patients they serve.

## **Key Academy Activities**

**Education.** The Academy's annual meeting is one of the largest and most important ophthalmic meetings in the world. This four-day event offers instruction courses, Skills Transfer labs, symposia, scientific papers, posters, surgical videos, and an exhibition, all designed to educate ophthalmologists and their health care teams about the practical applications of new advances in eye care.

The Academy also develops and produces a wide range of print and electronic educational materials, including reference books, videos, webinars, self-assessment programs and an expansive online education center, the Ophthalmic News and Education (ONE®) Network. These materials provide ongoing education for practicing ophthalmologists, residents and other health professionals. Many programs and materials carry CME credit.

**Eye Health Information.** Through a variety of materials and programs, including patient education publications, the EyeSmart® program and public information campaigns to promote eye health and safety, the Academy provides balanced, credible and timely information on preserving and protecting vision.

**Advocacy.** The Academy's Governmental Affairs Division in Washington, D.C., represents ophthalmologists and their patients before federal and state policy makers. The Academy also works with state ophthalmic organizations to represent the interests of ophthalmologists and their patients in state legislatures and with managed care organizations.

**Ophthalmic Practice.** The Academy recognizes the crucial role ophthalmic managers and administrators play in the success of any practice. Our practice management division, the American Academy of Ophthalmic Executives, offers a variety of educational programs and services tailored to their needs.

**Quality of Care.** The Academy's IRIS® Registry (Intelligent Research in Sight) is the nation's first EHR-based (electronic health record) comprehensive eye disease and condition registry. Physicians can use the data and benchmark reports to see how factors like pre-existing conditions, risk factors, age and gender affect outcomes for various conditions. They can then use this information to improve patient care and simplify federal quality reporting.

*(For additional Academy background, view the 2015 Year in Review: [www.aao.org/yearinreview](http://www.aao.org/yearinreview).)*

## Revenue

A third of the Academy's revenue comes directly from membership dues and fees. Another third comes from the annual meeting, and the remaining third comes from products, courses, and other sources.



### REVENUE – FYE 2016

**Membership Dues & Fees (35%)**

**Annual Meeting (33%)**

**Products & Courses (18%)**

**All Other (Advertising, Royalties, etc.) (13%)**

## COMPETITORS/MARKET SHARE

Since 93% of U.S. ophthalmologists are already Academy members, there is little room for growth here, so a lot of our efforts are focused on retention. This will be especially important in the coming years, as managed care organizations account for a greater portion of physician employment. Most of our membership growth efforts are focused on international physicians, allied health professionals, and domestic practice management staff.

At this point, no other ophthalmic association compares to the Academy in the breadth and depth of products and services we offer, or in the medical professionals or public we reach. However, this is also forecast to change over the next decade as other associations grow their own membership bases and expand their educational offerings.

Our biggest competitors are other supranational ophthalmic associations:

- APAO: Asia-Pacific Academy of Ophthalmology
- ESCRS: European Society of Cataract & Refractive Surgeons
- MEACO: Middle East Africa Council of Ophthalmology
- PAAO: Pan-American Association of Ophthalmology
- SOE: European Society of Ophthalmology
- ICO/WOC: International Council of Ophthalmology/World Ophthalmology Congress

As well as some U.S. associations:

- ASCRS: American Society of Cataract and Refractive Surgery
- ASRS: American Society of Retina Specialists

ASCRS is currently the biggest threat to the Academy. Though they began as a subspecialty organization for refractive surgeons, they have expanded their annual symposium and congress offerings to include Glaucoma Day and Cornea Day. They have their own practice management arm, the American Society of Ophthalmic Administrators (ASOA). They also engage in advocacy, which, though generally is in support of the same issues as the Academy, also takes support away from the Academy's own advocacy efforts. However, they do not have the plethora of educational materials that the Academy produces.

## II: Overview

### INTRODUCTION

When I first attended *ExhibitorLive* in 2015, it was just a way to take some possibly interesting courses and use up my annual professional development budget. What it turned out to be was a thought-provoking, inspirational, and affirming experience that got my creative juices flowing and motivated me to make improvements that I hadn't thought of before. I immediately signed up for the CTSM program, not so much for the post-name acronym or job advancement (though I'll take those, too!) as for satisfying my inner "A" student. Two *ExhibitorFastTraks* and another *ExhibitorLive* later, I have truly enjoyed the challenge to improve my skills, question the status quo, and build a more effective program. I will outline many of those improvements in this portfolio, which will focus on the **Academy Resource Center** (below) at the Academy's own annual meetings, **AAO 2015** and **AAO 2016**.



Academy Resource Center at AAO 2015.

## EVENT/TRADE SHOW PROGRAM OVERVIEW

The Academy's existence began with an annual meeting, and that event continues to be one of our core sources of revenue today, drawing about 25,000 attendees. It is also, in many members' minds, the most important feature of an Academy membership. Our next-biggest event is the annual Mid-Year Forum in Washington, D.C., where about 450 Academy members meet with members of Congress and discuss pressing issues in politics, policy, and practice management. We also produce an assortment of smaller meetings, including quarterly Board of Trustees meetings and Secretariat meetings. Our trade show program includes our own, at our annual meeting, plus about five to eight domestic and international shows per year.

## PROCESS

Since our annual meeting is so large and takes more than a year to plan, we have an entire Meetings & Exhibits Division of 18 staff who are the primary planners and are dedicated to the overall logistics. The remaining 180 Academy staff have varying degrees of responsibility, from merely attending, to staffing a booth or office, to planning and administering the many programs and events we offer within the meeting. For Mid-Year Forum and smaller events, Meetings provides housing and registration support. Trade show logistics (booth orders, construction) are largely handled by the Meetings promotions manager (Nicole). Trade show sales and marketing operations are handled by Marketing (me).

As the marketing manager for trade shows and events, my role is as follows:

- Annual meeting, Mid-Year Forum, trade shows:
  - Provide marketing communications strategy and support (with the assistance of my direct-report, the marketing specialist) to build attendance, product sales, membership, and various Academy initiatives
- Additional responsibilities for domestic and international trade shows, including AAO/Resource Center booth:
  - Design booth panels and clings
  - Arrange for collateral and displays
  - Procure product samples and inventory
  - Coordinate international distributor participation
  - Brief two to four attending staff
  - Staff booth
- Additional responsibilities for Academy Resource Center:
  - Organize in-booth events and sales promotions
  - Oversee branded giveaways
  - Create signage
  - Manage Meetings on Demand product marketing and sales
  - Conduct various product and overview training sessions
  - Create marketing staff schedules
  - Secure temporary staff
  - Directly oversee 9 marketing staff
  - Indirectly oversee about 88 other staff (some are only part-time)
  - Act as overall encyclopedic resource for staff's myriad questions and as go-to for unusual or problem situations

## MY CHOSEN SHOW: AAO 2015 & AAO 2016

Since I began my CTSM coursework in February 2015, I've been able to apply a lot of what I've learned, starting at AAO 2015 (Las Vegas) and continuing to AAO 2016 (Chicago).

The American Academy of Ophthalmology's annual meeting (AAO) is a four-day event comprising nearly 600 educational sessions, plus 500+ scientific posters, 50+ surgical videos, and more than a dozen special events. Topics cover all ophthalmology subspecialties, practice management, ethics, health policy and technology. In addition, Subspecialty Day comprises six to eight additional meetings each year, for extra in-depth focus. Physicians can receive up to 33 CME credits for the annual meeting and up to 7 credits per Subspecialty Day meeting. The exhibition is the largest in ophthalmology, averaging almost 600 companies in the past several years.



I chose AAO because, as our annual meeting tagline states, it's *Where all of ophthalmology meets*®. Of all ophthalmic meetings, it has the most peer-reviewed educational sessions, the largest exhibition, and the most networking opportunities, all of which attract the largest attendance — and it's our target audience. The Academy Resource Center has always been our most important exhibit, bringing in revenue that exponentially exceeds all other shows put together. It's also where attendees can meet face-to-face with almost every Academy department, take advantage of various member services, and get all their questions answered. And most importantly, it's the booth for which I have the most responsibility and the greatest challenges.

**Meeting Attendance.** AAO attendance has been consistently around 25,000 for the past 15 years. Attendance tends to relate to location, spiking in cities like Las Vegas and Orlando, where people can bring their families, and receding a bit in less-popular locations like New Orleans and Atlanta, the former of which is also not as easy to get to. In 2015, international attendees came from 129 countries. (*For additional demographics, see Appendix, pages i–ii.*)

PAST MEETING ATTENDANCE				
	AAO 2015	AAO 2014*	2013	2012
	Las Vegas	Chicago	Annual Meeting New Orleans	Joint Meeting (w/ APAO) Chicago
Domestic Physicians	9,111	8,277	8,108	8,261
International Physicians	6,373	5,276	4,817	5,413
Health Professionals	2,821	2,328	2,458	2,152
Spouses/Guests	1,801	1,323	1,482	1,389
Exhibitors	8,249	7,430	7,194	7,310
<b>Total Attendance</b>	<b>28,355</b>	<b>24,634</b>	<b>24,059</b>	<b>24,525</b>
# of Exhibiting Companies	585	620	589	573
Sq. Feet of Exhibit Space	238,400	240,000	236,500	232,000

\*Meeting name change from 2013 to 2014 reflects a rebranding of the meeting.

**Target Audience.** Our target audience includes the top three groups above: domestic physicians, international physicians, and health professionals. Within these categories are many sub-groups who are also targets: members, non-members, residents, young ophthalmologists, physicians preparing for Maintenance of Certification exams, comprehensive practitioners, subspecialists, nurses, technicians, and practice managers.

Even if I were employed at a different ophthalmology association, AAO would still be the most important show. As outlined in **20116: *Selecting the Right Shows: The Critical Decision***, it passes the five critical steps: the show is a good fit for our marketing objectives; it's highly attended and regarded by our target demographics; it satisfies our marketing criteria better than any other show; the quantitative and qualitative data are right on the mark; and analysis confirms that audience quality and traffic density are at acceptable levels. Because it's such a great show for us, we can justify the 110' x 110' footprint and staff of 97 to support it.

## III: Show Schedule & Measurable Show Objectives

### THE ACADEMY'S TRADE SHOW PROGRAM

The Academy's exhibition roster consistently includes four to six supranational ophthalmic organizations' congresses plus about three domestic subspecialty associations' meetings every year. Most other congresses/meetings are too small to be worthwhile for us. Some international shows are only held every two to three years. SOE (European Society of Ophthalmology) was not held in 2016 because it was held in 2015. *(See Appendix, page iii, for 2015 schedule, including AAO 2015.)*

2016 CONGRESSES/TRADE SHOWS					
Organization	Location	Dates	Booth Size	Staff	Estimated Attendance
<b>WOC/PAAO:</b> World Ophthalmology Congress/ Pan-American Assoc. of Ophthalmology (joint congress)	Guadalajara, Mexico	Feb. 5–9	3 x 6 m.	3	10,000
<b>APAO:</b> Asia-Pacific Academy of Ophthalmology	Taipei, China	Mar. 25–29	3 x 6 m.	3	4,000
<b>MEACO:</b> Middle East Africa Council of Ophthalmology	Manama, Bahrain	May 4–8	3 x 6 m.	3	4,000
<b>ASCRS:</b> American Society of Cataract and Refractive Surgery	New Orleans	May 7–9	20' x 20'	5	7,000
<b>ASRS:</b> American Society of Retina Specialists	San Francisco	Aug. 10–14	8' x 10'	2	1,000
<b>ESCRS:</b> European Society of Cataract & Refractive Surgeons	Copenhagen, Denmark	Sept. 10–14	3 x 6 m.	3	7,000
<b>AAO: American Academy of Ophthalmology</b>	<b>Chicago</b>	<b>Oct. 15–18</b>	<b>110' x 110'</b>	<b>97</b>	<b>25,000</b>

### Overarching Trade Show Objectives

At most shows, our primary objectives are to sell product, sell memberships and take dues payments, raise awareness of the Academy and our own annual meeting, and forge partnerships with local national societies for educational exchanges. Sales goals vary greatly (in the four- to five-digit range) depending on location, as language, education levels, and local economy all play a factor in interest in our products.

As our promotional budget is very small (usually \$0, in fact) for these shows, we tend to stick to email and social media. We often get free advertising in the printed programs, in exchange for advertising in our AAO printed programs. Occasionally we do something “extra” such as a mailed postcard, an onsite raffle, or a bag insert. Internationally, we also often sponsor symposia. Our booth at AAO, however, is a completely, fabulously different story...

## OUR PARTICIPATION AT AAO

At AAO, like other shows, our primary goals are to sell product, sell memberships and take dues payments. But because it's our own show, our large booth includes desks and kiosks with many more demo stations, plus a much more comprehensive selection of services from about a dozen other departments in the Academy. Our sales goal is much higher (nearly half a million dollars), largely because of the much greater number of attendees that speak English and have received marketing collateral for our products throughout the year.

Because AAO is our own show, we've already got a full meeting with symposia and sponsorships built in. Therefore, we're able to spend all our marketing budget on promoting the booth. We do a lot of pre-show and onsite marketing communication, plus several in-booth events. Because we are the Academy, the Resource Center gets a lot of "free" promotion in show collateral as well.

AAO 2016/ACADEMY RESOURCE CENTER AT A GLANCE	
<b>Congress</b>	<b>AAO 2016:</b> American Academy of Ophthalmology
<b>Congress Theme</b>	INNOVATE
<b>Website</b>	Meeting: <a href="http://www.aao.org/2016">www.aao.org/2016</a> Resource Center: <a href="http://www.aao.org/resourcecenter">www.aao.org/resourcecenter</a>
<b>Location</b>	Chicago – McCormick Place (North, South, Lakeside Buildings)
<b>Booth Location, #</b>	South Building, Hall A, #508
<b>Show Dates</b>	<b>AAO Program:</b> Saturday, 10/15 – Tuesday, 10/18 <b>Subspecialty Day:</b> Friday, 10/14 – Saturday, 10/15 <b>AAOE Program:</b> Saturday, 10/15 – Tuesday, 10/18 (AAOE = American Academy of Ophthalmic Executives)
<b>Exhibition Dates/Times</b>	Saturday, 10/15 – Monday, 10/17: 9 a.m. – 5 p.m. Tuesday, 10/18: 9 a.m. – 1 p.m.
<b>Booth Size</b>	110' x 110' (12,100 sf)
<b>Booth Install</b>	Booth install: Wednesday, 10/12 – Friday, 10/14 Staff set up desks/kiosks: Friday, 10/14, 10 a.m. – 3 p.m.
<b>Booth Dismantle</b>	Staff pack desks/kiosks: Tuesday, 10/18, 1 p.m. – 4 p.m. Booth dismantle: Tuesday, 10/18 – Thursday, 10/20
<b>Booth Space Cost</b>	\$0/comp (valued at \$411,400 [\$34/sf])
<b>Budgets</b>	<b>Booth Logistics:</b> \$176,000 <b>Marketing Promotions:</b> \$36,100 (Marketing dept. only; does not include budgets for events/etc. from other departments' involvement)
<b>Primary Products</b>	Clinical Education (including ONE Network), Patient Education, AAOE/Practice Management, Meetings on Demand
<b>Primary Services</b>	Membership, EyeSmart (public health information), Video Production Studio, Advocacy, IRIS Registry
<b>Onsite Leadership</b>	Nicole Naughten, Promotions Manager, Meetings & Exhibits (booth logistics) Brandi Brooks, Director, Marketing (marketing operations – oversight) Karen Cristello, Manager, Marketing (marketing operations – execution/oversight)
<b>Staff Walk-Through</b>	At Resource Center, Booth 508, Friday, 10/14, 3:30 – 4:30 p.m.
<b>Staff Appreciation</b>	Staff Kick-Off Party, Sheraton, Friday, 10/14, 5:30 – 6:30 p.m. Staff Wrap Party, Three Dots and a Dash, Tuesday, 10/18, 7:00 – 10:00 p.m.

## MEASURABLE SHOW OBJECTIVES FOR AAO 2016

We've measured Marketing's overall sales goals and attendee satisfaction for a long time. But until I took course **20215: Basic Project Management and Reporting Skills**, I had never thought to drill up or down to take into account our overall corporate goals or our department goals. As a result, I've added these details to my staff training sessions, as I think it's important for all booth staff to be aware of each other's priorities. I also suspect that some departments previously hadn't thought much about their goals, either, so my asking them to establish goals may help them be more focused as well.

**10816: How to Measure the Value of Trade Show Participation** was also useful in helping me set goals. It prompted me to think in more specific terms about what I want participants to do as a result of being at the exhibit, and who can perform the expected action so it benefits our company.

Our overarching Resource Center objectives tie directly into our corporate brand strategy. They are:

- To establish the Academy as the world-recognized **leader** in ophthalmic education,
- To communicate the development of **innovative** programs and educational opportunities,
- To build our sense of **community** and close the gap between the company/staff ("us") and the members ("them"),
- To communicate the **impact** the Academy has on patients worldwide, and
- To communicate our value so all ophthalmologists feel that membership is critical to their **success**.

Following are the Corporate and Marketing measurable goals (desired end result) that support our objectives; strategies (how to achieve the goal); tactics (what actions taken); and assessment methods (measurement) for the Academy Resource Center at AAO 2016. (See Appendix, pages iv–v, for departmental goals.)

MEASURABLE SHOW GOALS FOR THE ACADEMY RESOURCE CENTER AT AAO 2016			
Corporate (CEO, VPs; brand, mission)			
Measurable Goals	Strategies	Tactics	Assessment Methods
Increase perception of Academy as community	Provide a relaxing member oasis	Sofas, tables/chairs, water, magazines	Observation
Enable members to complete all Academy business efficiently	Be the one-stop shop for everything Academy	All departments represented, well-staffed	Observation of staffing presence & levels
Increase awareness and positive perceptions of our new brand	Booth, staff, product, events – everything breathes the brand	Booth art, brand video, branded collateral, 'astute' communication, purple shirts	Focus Groups Brand Team observations

(continued)

Marketing (overall booth)			
Measurable Goals	Strategies	Tactics	Assessment Methods
Total sales of products and services: \$375,000 (\$355K during show; \$20K in two weeks following)	<ul style="list-style-type: none"> <li>• 10% discount</li> <li>• Knowledgeable staff</li> <li>• Generate booth traffic</li> </ul>	<ul style="list-style-type: none"> <li>• Automatic onsite discount &amp; post-show discount card</li> <li>• Invite staff to cross-training sessions; add FAQs/flashcards</li> <li>• Pre-show/onsite promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Post-show sales report</li> <li>• Training email</li> <li>• Records of promo items</li> </ul>
<i>(Sales goal applies to Clinical Education, Patient Education, AAOE Products, and Video Production Studio, and will not be repeated in department goals chart in Appendix.)</i>			
Achieve levels of service equal to or better than 2015: <ul style="list-style-type: none"> <li>• Service ≥87%</li> <li>• Knowledge ≥83%</li> <li>• Finding P/S ≥81%</li> <li>• Ordering ≥88%</li> </ul>	Provide exemplary service, accurate information	<ul style="list-style-type: none"> <li>• Comprehensive training to tackle FAQs</li> <li>• Advanced training w/ outside contractor</li> </ul>	Post-show purchasers survey
<i>(Service goal applies to all Resource Center staff and will not be repeated in department goals chart in Appendix.)</i>			

## A Note About Leads

While many companies focus a lot of effort on getting leads at their shows, we don't. There are several reasons for this:

- The Academy has a marketing staff that includes four people dedicated to product marketing. However, we don't have a sales staff, and therefore, are very limited in our ability to follow up.
- The price point of our products makes it economically infeasible to follow up individually with very many people.
- Because of the nature of our products — educational print and eBooks, online resources, videos, webinars, etc. — people purchase them on the spot.
- Most people don't want to be scanned for showing interest in a book.
- Membership already has every nonmember attendee in the database.

A couple departments do use lead retrieval: Patient Education, for follow-up regarding EHR integration; and the Foundation, for tracking interest in our EyeCare America® volunteer program. And of course, if any customer requests follow-up on any product, service, or issue, we do take their information on a log for that purpose. We also have a Resource Router, which allows attendees to email any staff person who is not present at the Resource Center.

Though we don't know exactly who visits the Resource Center (aside from people who make a purchase), we do have full access to the meeting attendance list, and can follow up with everyone in demographically targeted communications post-meeting.

In the future, I'd love to be able to implement radio-frequency identification (RFID) tags or another technology so we can see exactly who comes to the booth and what their interests might be.

## IV: Management of Exhibit Design and Production

### MANAGEMENT PLANNING

#### Logistics

The Academy Resource Center, at 110' x 110' and containing 18 departmental kiosks and desks within, requires a great deal of organization and cooperation. Most of the planning for the actual booth structure and logistics is led by the Meetings & Exhibits division's promotions manager, Nicole. She works with the exhibit house on all things production, including overhead banners, signage, computers, electrical, furniture, floral, drayage, and the actual build. I lead the fun stuff — marketing operations and strategy — including graphics, collateral, promos, events, staff training, and coordination of our product teams. Beyond that, each kiosk and desk has a lead that organizes their own smaller details. All together, we are the Resource Center Advisory Team (RCAT).

The RCAT meets a couple times pre-show to review the overall plan, and once post-show to share feedback and plan improvements for the following year. (We used to meet more often but the Academy has such low turnover that most of us have been working this booth for several years and have become a well-oiled machine.) Nicole also meets with the individual leads to review booth orders and make sure everything has been ordered properly and that every station has what we need.

#### Marketing Operations

I always meet with the marketing planning team, product teams and booth staff pre-show, but when I took course **20215: Basic Project Management and Reporting Skills**, I realized that I needed to step up my communication game. This course reminded me that consistent, active communication is important to project management, including information distribution and performance reporting. In response, at AAO 2015 I made an effort to share more details about sales goals and planning pre-show, and added a whiteboard to the staff break room so I could share our daily sales successes. In turn, staff could write their own messages on the board — ranging from “happy birthday” messages to questions about products. I also did a better job of closing the cycle with a final sales report and thank you to the staff, who tend to feel underappreciated.

Though the course was geared more toward training meetings, many of the concepts in **20416: Don't Skip the Meetings — Pre, At and Post: Guideposts to Success** are just as applicable to planning meetings. For AAO 2016, I added an additional meeting at the beginning of the planning process, just for the marketing department. I'm not keen on inducing meeting overload, but in this case I felt that having an early kick-off with all of us together from the start would improve efficiency. And it did. We talked about this year's goals, strategies and tactics; product messages; and how to resolve issues that came up last year. As a result, their questions were answered earlier in the process and I even got some new ideas for improving staff training and onsite marketing operations.

Additional planning topics I discussed with the clinical education, patient education, and AAOE/practice management product teams (including representation by marketing product managers) include:

- How/where to display print products
- How/where to display digital product “props”
- Creation of product prototypes when samples are not available
- Adjustments to displays due to moves and new product types (e.g., adjusting shelving, changing signs, adding Internet, etc.)
- Responsibilities for iPad storage, charging and daily set-up
- Staffing levels and scheduling
- Resource Router (digital) handouts
- “What’s here” signs for monitors
- Event activities and talking points
- Freight and other onsite responsibilities

## **BOOTH REBRAND AND DESIGN NEEDS**

### **Vendor Relationship and Design Background**

Freeman has been the Academy’s general contractor for more than 25 years. They have the whole meeting, including session production, A/V, signage, freight, and the exhibit hall. They are also our design partner for the Resource Center. Nicole is the point person for dealing with Freeman as related to booth logistics. (I have contact with them for other meeting-related things, but not for this booth.)

The Resource Center was redesigned and rebuilt in 2010. This was a huge improvement, going from dull and drab navy and tan Plexiglas, mottled laminate, and burlap-evoking substrate, to sleek and sophisticated cherry wood, frosted clear Plexiglas, and faux chrome. This rebirth from nerdy ‘70s to cool 21<sup>st</sup>-century cost us about \$900,000. It was a very necessary, brand-appropriate change, but because of the cost, we are married to it until 2020.

In the meantime, we have a limited budget for improvements and are only allowed to make minimal, necessary changes to the booth. Also, we are unable to move most desks and kiosks due to the overhead supports. This requires us to sometimes be creative when it comes to incorporating new technology or making other adjustments due to new products and services that weren’t predicted five years ago.

### **AAO 2015 Rebrand**

In 2013, the Academy embarked on a journey to rebrand the entire association. This initiative goes far beyond a new logo, palette, and font, though those things are the most visible. It included our tagline (which many people were very attached to), brand architecture (everything under one “roof”), written voice (of a savvy physician), streamlining internal processes (more centralized), and stricter adherence to brand guidelines by all departments.

By AAO 2015, we were ready for a soft launch. We couldn’t rebrand everything at the meeting at once, so we started with the Resource Center and other Academy properties inside the exhibit hall. As a

member of the five-person core team that is leading implementation of our new brand, I have a particular stake in the rebranding of the Resource Center.

## Design Needs for the AAO 2015 Booth

We didn't have a budget to give the Resource Center a new-brand facelift, so the extra funds to do so had to be approved by the Board of Trustees. We kept changes minimal, addressing only the elements that would be glaring reminders of the old brand: the overhead circular banners, the wall graphics, and the icon cutouts. We felt that the current font used on the cherry overhead signs, the headers, and the subheaders was close enough to our new font that we did not need to change them. (Other brand-related but non-structural changes are addressed in Section V: Management of Integrated Marketing Communications.)

Since we can't divorce our booth until 2020 and we are still under contract with Freeman, we didn't go through an RFP process. Instead, we had a list of required needs that would help us meet our goals. The VP, Meetings & Exhibits (Debra) negotiated that deal. The following list includes these brand needs, as well as some needs related to product presentation.

LIST OF NEEDS FOR AAO 2015	
Need	Goal Satisfied
1. Redesign circular overhead banners	Corporate: Increase awareness and positive perceptions of our new brand
2. Redesign booth wall graphics	
3. Redesign icon cutouts	
4. Add tables for Coding conversations	Corporate: Enable members to complete all Academy business efficiently
5. Add permanent iPad stations	
6. Move AAOE product kiosk for better line of sight	Marketing: Achieve levels of service equal to or better than 2015 — Ease of finding products/ services ≥81%
7. Update subheaders according to product moves	

For AAO 2016, the only needs we had were to update one desk header and a few product subheaders.

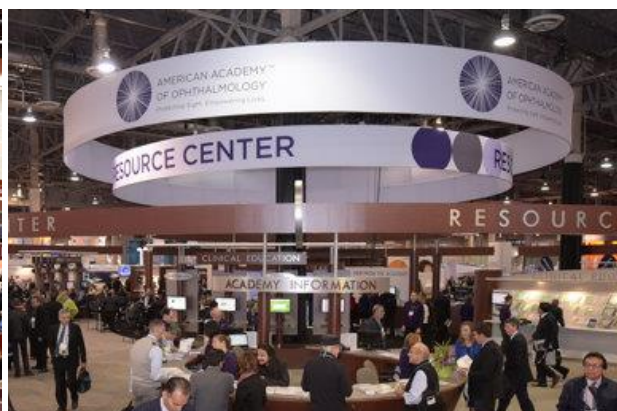
## PRODUCTION STRATEGY

### Need #1: Redesign Circular Overhead Banners

The first glaring reminder of our old brand was our outdated logo and empty tagline. Our existing overhead banners had our logo on the top, biggest one, and "Resource Center" on the lower, smaller one. We decided to emulate this same hierarchy with our new banners. In course **320: Tate & Lyle: A Taste of Trade Show Marketing Excellence**, the presenters showed their recommendation for overhead banners, which was to incorporate branding on the top and a message or tagline on the bottom. Though we did this (albeit, not with a "real" message), next time I think I'd go with the tagline on the bottom instead. One reason is that we already have "Resource Center" on the cherry overhead signs. But also, I think it's more important to more prominently feature our tagline, which really describes our brand and purpose. We did it this way later on our smaller ASCRS 2016 booth, and I much prefer it. Also, I think attendees are looking for the "Academy" more than the "Resource Center."



**Old overhead banners.** Top: Eyes and old logo with tagline, “The Eye M.D. Association”. Bottom: “Resource Center” and eyes. Note the cherry overhead sign that repeats “Resource Center”



**New overhead banners.** Top: New logo and tagline, “Protecting Sight. Empowering Lives.” Bottom: “Resource Center” in new Gotham font; purple circles. Circles are a primary design element in our new brand.

## Need #2: Redesign Booth Wall Graphics

Course **31115: How to Grow Your Brand: Incorporating Brand Marketing Into Your Exhibit Program** couldn’t have come at a better time. Key takeaways included: in a brand launch, emotional values, getting attention and leaving an impression are important; events and trade shows are the front lines of brand building and every detail counts; and experiences should be meaningful and increase the length of the visit. Similarly, course **61715: Graphics Boot Camp: The Basics Every Event Manager Should Know** pointed out that unexpected images can be extremely effective in grabbing attendees’ attention and improving memorability. It also emphasized considering height, placement and distance of logos, images and text; and limiting quantity of text (if it takes a nine-year-old longer than 10 seconds to read, it’s too much).

We felt that our old wall graphics had emotional value and were effective in grabbing attendees’ attention — though not unexpected, the photos are bigger-than-life. The quotes we had used also contributed to emotional value, were meaningful to our audience, and were short enough to read in a long glance. So, we decided that our graphics passed the “litmus test” and we would keep the same general design theme. However, to make sure the new graphics were on-brand and top-quality, I sourced new photos, which were cropped to circles.

(Art on next page.)



**Old wall graphics, store.** Full-height images. Quotes were only used on outside walls.



**New wall graphics, store.** Nearly full-height images placed in circles. Colored circles added. Quote added in circle on adjacent wall. The grandma on the old graphic had rosacea, which our physicians always commented on. We took the opportunity to replace her with a clear-skinned grandma.



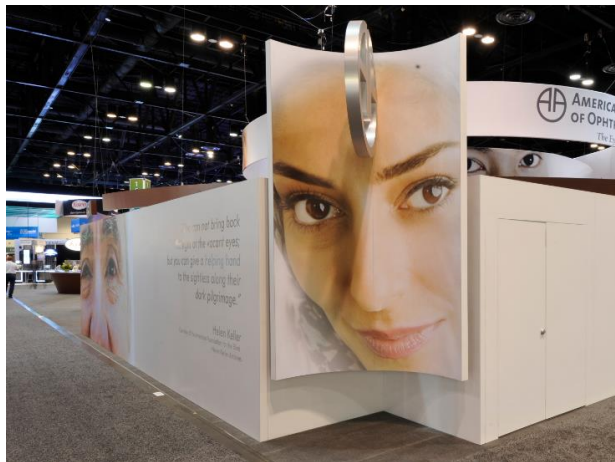
**Old wall graphic, back of store.** Full-height image, eye-related quote. And a typo!



**New wall graphic, back of store.** Full-height image and eye-related quote, placed in circles, typo-free.

### Need #3: Redesign Icon Cutouts

Our “old” booth incorporated cut-outs of our AAO icon, which was round. As it happens, our new “focus” icon is also round, so this was a simple redesign. Rather than creating completely new cut-outs, all we had to do was overlay a graphic of the new icon over the old cut-outs. This saved time for Freeman and money for us. The trickiest part of this was getting the printer calibrated to the correct output for our new colors. There are eight of these cut-outs in the booth, on the front desks, center product kiosks, and back wall corners.



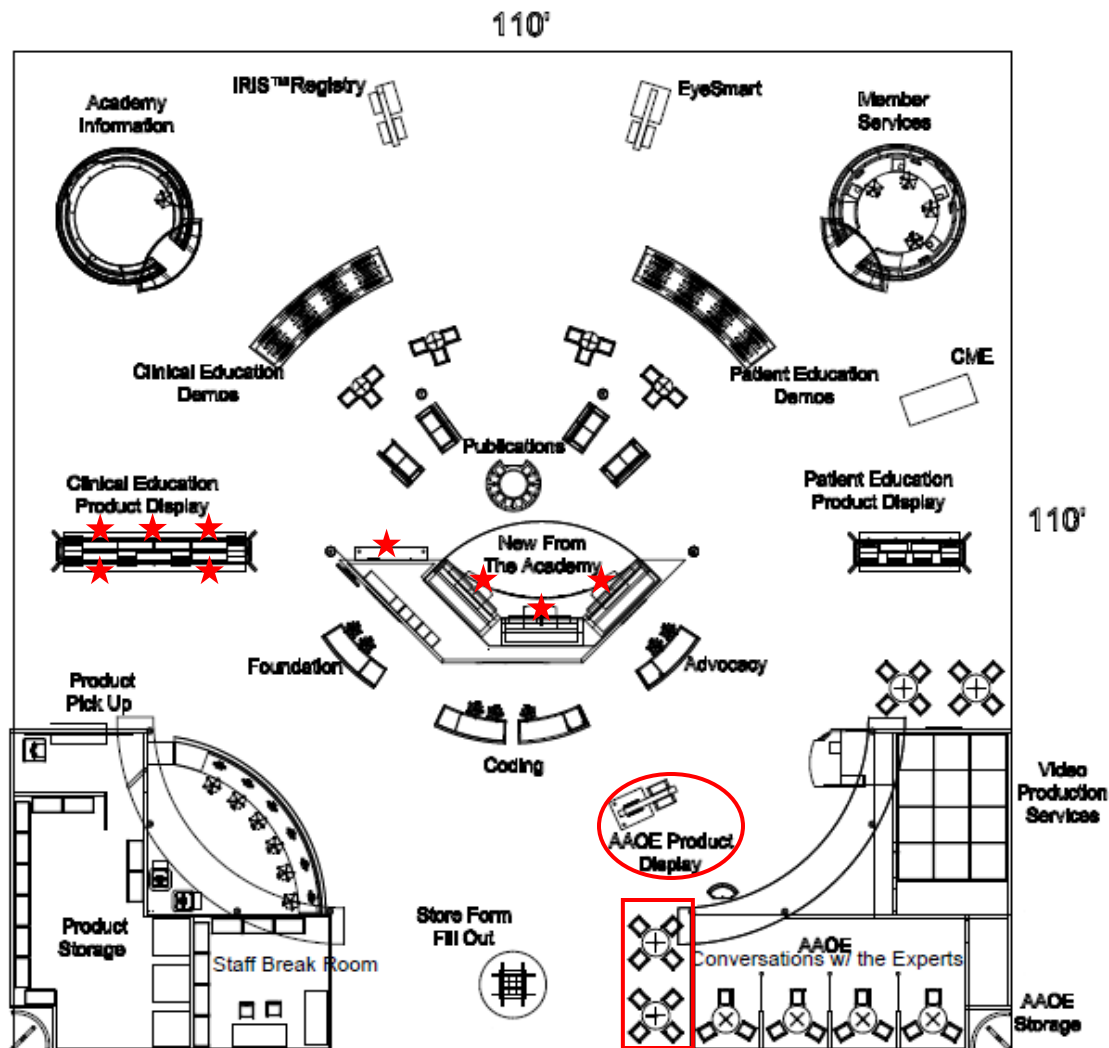
**Old icon cutout.** “AAO” icon. Note unfortunate placement on back corner graphic, creating a unicorn-like look.



**New icon cutout.** “Focus” icon. The purple and white graphic was adhered over the old AAO icon. Unicorn replaced with new tagline.

### Need #4: Add Tables for Coding Conversations

As mentioned above, we don’t have much flexibility in placement of our desks and kiosks, as many of them support overhead structures. Also, they are spaced out to accommodate flow between more and less visited stations, so moving one might disrupt another. However, we had some unused space at the very back of the booth, so were able to fulfill AAOE’s request for two additional meeting tables. The back of the booth is on a less-busy aisle, so flow isn’t a problem and it’s quiet enough to have a conversation. (See diagram on next page.)



**Resource Center Layout.** The red rectangle indicates the two tables that were added for AAOE coding conversations (Need #4). The stars indicate placement of the new iPad stations (Need #5). The red oval indicates the AAOE product kiosk that was moved three feet to the right (Need #6).

## Need #5: Add Permanent iPad Stations

When the booth was designed in 2010, we had very few online products and no eBook products at all. That has changed drastically. Now, almost every print book is also offered in eBook format, and many new online programs and resources have been created. With these digital publications comes the need to demonstrate products in a way we had not originally accounted for. Enter iPads.

We had demonstrated on iPads in 2014, but they didn't look intentional and we didn't like the visible security cords. So for AAO 2015 we decided to fully commit to nine new, permanently installed iPad stands. Four were placed in the New From the Academy area and five were placed at the Clinical Education products kiosk. (See diagram above for placements.)



**New iPad stands in the New From the Academy area at AAO 2015.** They look much more stylish and professional than when the “bare” iPads laid on the counters with security cords in 2014.

### **Need #6: Move AAOE Product Kiosk for Better Line of Sight**

Who says nothing in (trade show) life is free?! The original placement of the AAOE product kiosk obstructed the line of sight from the Coding desk to the new Coding conversations tables. Luckily, this kiosk is freestanding so it was an easy fix, no redesign or fabrication required. This move also freed up more space in front of the Coding desk, which can get quite crowded. (See diagram on previous page for placement.)

### **Need #7: Update Subheaders According to Product Moves**

Every year, products are born, gain or lose stature, or die. We can’t move most of the internal structures to accommodate changing displays, but we can rearrange products within the existing structures. For AAO 2015, we made eight subheader changes. Three of these were due to changes in the product or station name (e.g., Online Community > Academy Forum), and five were due to product moves (e.g., Meetings on Demand moved from Patient Education to Clinical Education). For AAO 2016, we made only six subheader changes, and they were the only changes to the whole booth. (Photo on next page.)



**AAO 2015 Subheaders (below the monitors).**  
**Left:** Changed from Patient Education Handout Subscription in 2014 to Patient Education Videos in 2015 and Clinical Education Webinars in 2016.  
**Right:** Changed from Focal Points in 2014 to eBook Support in 2015 and 2016.

## BUDGET PLAN

**Marketing Operations.** This budget includes collateral and booth activities and is maintained by the Marketing department (me). See Section V: Management of Integrated Marketing Communications for details.

**Booth Structure and Logistics.** This budget is maintained by the Meetings & Exhibits division and is created in categories that sometimes comprise multiple line items. I was unable to obtain a detailed breakdown of those specific line items but have listed what was included under each category.

BUDGET FOR AAO 2015 ACADEMY RESOURCE CENTER – M&E			
Line Item	Budget	Actual	Variance
Contractual Services (floral, credit card machines, lead retrieval)	\$ 35,000	\$ 25,789	26%
Decorating – Contractual (computers, furniture, signage)	\$126,000	\$159,320	(26%)
Convention Center Services (catering/water, internet, electrical, telephone, garbage/cleaning)	\$ 15,000	\$ 55,632	(271%)
Security	\$ 0	\$ 1,313	(100%)
Onsite Staffing	\$ 0	\$ 1,756	(100%)
Temporary Help	\$ 0	\$ 1,963	(100%)
Miscellaneous Expenses	\$ 0	\$ 326	(100%)
<b>TOTAL</b>	<b>\$176,000</b>	<b>\$246,099</b>	<b>(40%)</b>

A lot of the overage was due to the new overhead banners, focus icons and wall graphics, which were not forecast (though we saved a little by designing them in-house and the extra production cost was

approved by our Board); and the especially high rates of the Sands Expo. Some items, such as drayage and some labor, are not included here, as they were rolled up into our overall AAO 2015 conference production expenses.

**Marketing Travel.** Following is my budget for the Marketing department’s staff participation in the show. Each department at the Academy is responsible for their own travel budgets, and not everyone works in the Resource Center, so I am not including them here. I based the original budget on 9 staff members for 6 nights/7 days. Projected rates and allowances were provided by Meetings & Exhibits and Finance and rounded to the nearest \$100. Lower actuals were a result of more comped rooms than expected, cheaper airfares, fewer staff days, and lower-than-expected costs in the staff lounge.

<b>BUDGET FOR AAO 2015 TRAVEL – MARKETING DEPT.</b>			
<b>Line Item</b>	<b>Budget</b>	<b>Actual</b>	<b>Variance</b>
Hotel (\$90/night)	\$ 4,900	\$ 3,585	27%
Airfare (SFO – LAS, \$250 p/p)	\$ 2,300	\$ 1,950	15%
Meals/Per Diem (\$75/day)	\$ 4,700	\$ 4,250	10%
Catering – Staff Lounge (\$450 p/p)	\$ 4,100	\$ 3,608	12%
<b>TOTAL</b>	<b>\$16,000</b>	<b>\$13,393</b>	<b>16%</b>

**Other Resource Center Staff Travel.** Total Resource Center staff travel expenditure was probably around \$130,000. That estimate is based on a staff of 97, with at least 12 staff splitting time between the Resource Center and other areas of the meeting (e.g., committee meetings, registration, teaching courses, focus groups) and therefore splitting their expenses over multiple budgets.

# V: Management of Integrated Marketing Communications

## MARKETING COMMUNICATIONS PLANNING

While Meetings & Exhibits (Nicole) oversees booth logistics, I'm in charge of marketing operations and strategy, which includes integrated marketing communications (IMC). Many of our IMC tactical pieces are carried out by my direct report, the marketing communications specialist (Reina).

About eight months before the show, I draft a preliminary marketing plan that includes in-booth events and promotions, pre-show communications, at-show communications, and other marketing activities. I then call a meeting with key staff to brainstorm other ideas and confirm the plan. This marketing planning team consists of the VP, Marketing & Communications (Renaldo); director of marketing (my boss, Brandi); Reina; the VP, Meetings & Exhibits (Debra); and Nicole.

Our IMC activities are fairly similar from year to year. Details on new activities (added in 2015 and 2016), specific goals, and the complete IMC plans are described below. (*For complete AAO 2015 and AAO 2016 marketing plans, see Appendix, pages vi–xii.*)

## ACADEMY REBRAND

As mentioned in Section IV, the Academy began a rebranding process in 2013. Two years later, we were ready for a soft launch at AAO 2015. This meant that the new brand identity would be applied to the Academy Resource Center and other Academy properties within the exhibit hall; and the new brand would be introduced at the Opening Session. The rest of the Academy's products, services and programs would be rebranded starting in January, 2016.

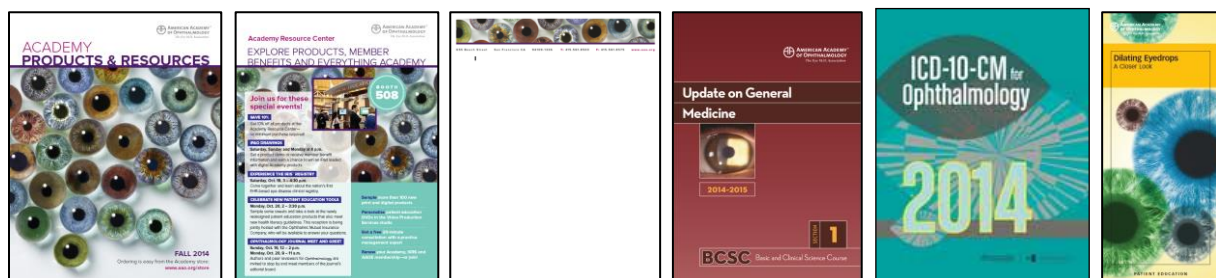
I took course **61715: Graphics Boot Camp: The Basics Every Event Manager Should Know** at a perfect time in our rebranding process and some key points exactly expressed what we are trying to do and why:

- *All brand touchpoints must be consistent* – visually, strategically, tonally, thematically. This is important for us to remember, as campaigns within the brand can differ. We needed to improve consistency in our Resource Center marketing to ensure clear messaging both within the overall brand and specific to its own campaign.
- *Apply this consistency to every element of your messaging*, including booth architecture, color, and graphics; multi-media; advertising campaigns; website; travel corridor graphics; invitations; off-site event graphics; and post-show mailings. By 2016, a stroll around the Resource Center was like a breath of fresh sea air. All elements looked like the same, harmonious Academy brand.
- *Every graphic representation should be consistent* – this increases effectiveness, brand awareness, and the attendee's overall impression. It's a challenge to make all employees (non-marketers) understand the importance of consistency. I added this point to my Overview

Training to demonstrate our new graphic cohesion, but also to help convey that booth staff behavior and interaction style also impart our brand attributes. It is a one-million-piece orchestra.

## Before

In the past, the Academy, including the Resource Center and associated collateral, had no consistent look, and little to no branding at all, aside from the logo and tagline. In 2013, I began applying the official Academy fonts and color palette and the look (artwork, general design) of the product and resource catalog to all Resource Center collateral pieces. This helped give *some* consistency to our marketing but it still didn't scream "Academy." And with inconsistent branding across all Academy assets, a glance around the Resource Center looked like what the Brand Team has dubbed a jumbled, "hot mess."



**2014 and before: The "hot mess."** Product & Resource catalog; Resource Center ad and handout template; products from Clinical Education, AAOE, and Patient Education. The only consistency was in the catalog and Resource Center collateral.

## Transition – AAO 2015

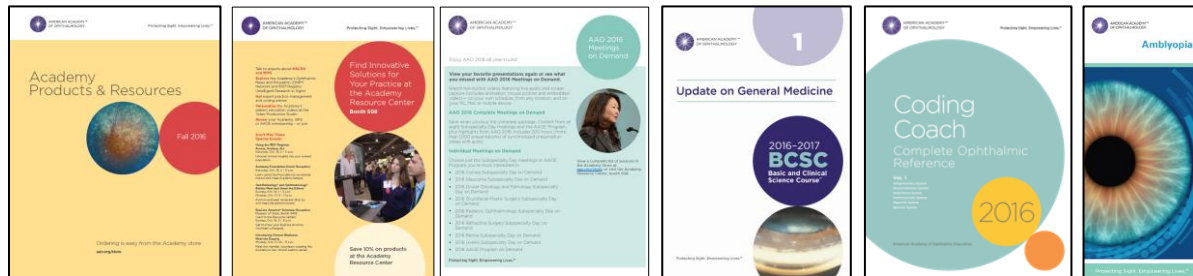
One challenge we had for the AAO 2015 Resource Center was that the new brand's soft launch came mid-way into our production schedule: Only collateral that would be displayed on site would be rebranded; anything members would see before the meeting remained same-old, old brand. We began our pre-show promotion with collateral that matched the look of the catalog, as in 2013 and 2014. But since the soft-launch occurred at AAO 2015, everything on site had to follow our new brand guidelines. To accomplish this without sacrificing overall consistency, we created a hybrid look that used the pre-launch look in combination with the new logo, fonts, colors, and circle graphics.



**2015: The awkward stage.** Resource Center collateral: Old brand – Product & Resource catalog, ad, hotel door drop brochure; new brand – handout template, raffle card, discount card. Coincidentally, we used circles in the early designs, though not in the same way we use them now (now, they "kiss" but never overlap). This helped the materials tie together a little less awkwardly.

## After – AAO 2016

Now, with our new brand guidelines, we have clear design direction, resulting in materials that are clearly identifiable as Academy assets. All together, our Resource Center marketing collateral, in combination with products, contribute to a clean, consistent look across the booth. This makes for stronger brand recognition and the ability to communicate our overarching objectives more clearly.



**2016: Clean, clear, consistent.** Product & Resource catalog; Resource Center ad and handout template; products from Clinical Education, AAOE, and Patient Education. The launch is nearly complete, so all collateral and all new product designs fall within the new brand guidelines. (There are still some old products that have not been rebranded, as reprinting would be cost-prohibitive.)

## IMC ACTIVITIES AND GOALS – PRE, ONSITE, AND POST

As outlined in Section III, we've got some hefty corporate, marketing, and departmental goals to achieve. These all depend on getting bodies in the booth. Following are details of our robust marketing plans that ensure we pull off the tactics and get the visitors we need to accomplish our goals.

Each tactic (communication method) is linked to the overall corporate (C) and marketing (M) Resource Center goals below, as described preceding each of the following tables:

- (C) Increase the perception of the Academy as a **community**.
- (C) Enable members to complete all Academy **business** efficiently.
- (C) Increase awareness and positive perceptions of our new **brand**.
- (M) Achieve total **sales** of products and services of \$375,000 or more.
- (M) Achieve levels of **service** equal to or better than 2015 – Quality of service  $\geq 87\%$ ; Knowledge of products/services  $\geq 83\%$ ; Ease of finding products/ services  $\geq 81\%$ ; Ease of ordering  $\geq 88\%$ .

In addition, as learned in course **31515: Integrated Marketing Communications**, there are four categories of objectives for marketing tactics: **awareness** (create and stimulate interest and awareness), **comprehension** (inform, educate), **conviction** (convey benefits as better than competition), and **action** (sales). These are expressed when applicable in the Rationale column in the tables below.

## Pre-Show Communications

The pre-show communications satisfy the overall Resource Center objectives of **business**, **brand**, and **sales**.

We promoted our AAO 2016 booth and events via the following communication methods.

AAO 2016 RESOURCE CENTER PRE-SHOW COMMUNICATIONS GOALS			
Communication Method	Rationale	Target Audience	Measurable Goal
Blurbs in AAO 2016 email blasts	Free, awareness, wide reach	Potential attendees	Click-throughs 1% over 2015
Blurb in registration confirmation email	Free, awareness	Preregistered attendees	Included in all confirmations
Blurbs in Academy Express	Free, awareness, wide reach	AAO members	Click-throughs 1% over 2015
Booth description in Virtual Exhibition	Free, awareness	Website visitors	Populated by 9/01
Webpage	Free, awareness, sales, thorough information, conviction	Website visitors	750 page views (5% of projected attendance)
<i>New in 2016:</i> Video Ad/ Testimonial	Inexpensive, awareness, wide reach	All attendees	1,000+ impressions
<i>New in 2016:</i> RC page in badge mailing brochure (replaced RC mini-brochure)	Inexpensive, awareness, sales	Preregistered attendees	12,500+ impressions
<i>New in 2015:</i> 2-pg spread in Fall product & resource catalog	Inexpensive, awareness, sales, wide reach	US members (print), intl members (online)	23,000+ impressions
Card in card pack	Free, awareness	Preregistered attendees	12,500+ impressions
<i>New in 2016:</i> Blurbs in Practice Management Express	Free, awareness, wide reach	AAOE members	Click-throughs 1%
RC Postcard	Awareness, sales, targeted audience	Preregistered attendees	10,000+ impressions
Twitter/Facebook/LinkedIn	Free, awareness, audience interaction	Attendees	T: at least 5 retweets; FB: at least 10 shares
Dedicated Email blast	Free, awareness, sales, wide reach, conviction	Preregistered attendees	Open rate 41%, click-throughs 3%
AAO.org spotlights	Free, awareness	Website visitors	Posted by deadlines

## At-Show Communications

The at-show communications satisfy the overall Resource Center objectives of **business, brand, and sales**.

In 2016 we cancelled one promotion — the iPad raffle — because it no longer satisfied these objectives. We had this raffle for four years in a row and it had outlived its effectiveness. It wasn't drawing the right people, didn't create more business, and attendees just didn't seem to care much about it anymore. I felt comfortable with this decision, which was consistent with presenters' viewpoints in two courses: **31515** (iPads aren't compelling anymore) and **10816: How to Measure the Value of Trade Show**

**Participation** (Business value comes from actions by the overall audience and booth visitors; drawings, such as for an apple watch, aren't exciting and bring low-quality visitors).

During AAO 2016, we promoted our booth and events via the following communication methods.

AAO 2016 RESOURCE CENTER ONSITE COMMUNICATIONS GOALS			
Communication Method	Rationale	Target Audience	Measurable Goal
Ad: <i>EyeNet Magazine</i>	Inexpensive, wide reach, awareness	All attendees	43,000+ impressions (21k on mailing list; 22k in reg bags)
Ad: Subspecialty Day Syllabi (8)	Free, awareness	Subspecialty Day physician attendees	7,500+ impressions
Ad: Meeting Program	Free, awareness	All attendees	22,000+ impressions
<i>New in 2016:</i> Ad: <i>EyeNet Exhibitor Guide</i>	Inexpensive, awareness, wide reach	All attendees	15,000+ impressions
Hotel door drop brochure	Targeted, thorough information, sales, conviction, awareness	11,600 attendees at top hotels	11,800 impressions
Session room walk-in slides	Free, awareness, wide reach	All attendees	Slide included in each room's deck
Twitter/Facebook/LinkedIn	Free, awareness, audience interaction	All attendees	T: 10+ retweets; FB: 20+ shares
<i>New in 2015:</i> Daily event meter panels at front of booth	Awareness	All attendees	Placed from open to close each day
<i>New in 2016:</i> Meter panels in Grand Concourse	Awareness	All attendees	Placed by 5pm Friday, kept up through end
Page in Mobile Meeting Guide	Free, awareness	All attendees	100+ impressions
<i>New in 2016:</i> Catalogs @ Meeting Info desks	Free, awareness, information, sales	All attendees	200 delivered (impressions are included in the pre-show goal)
2-pg feature in <i>EyeNet Academy News</i>	Free, awareness, sales, wide reach	All attendees	13,000+ impressions
Premium listing in <i>EyeNet Exhibitor Guide</i>	Free, awareness, sales, wide reach	All attendees	15,000+ impressions
Blurb in <i>EyeNet Academy Live</i>	Free, awareness, wide reach	All members and registered attendees	43,000+ impressions
Screensaver for Rest Stop monitors	Free, awareness	All members	Loaded on all computers
Postcards in AAOE, SO, YO, and Intl lounges	Inexpensive, awareness	All AAOE, SO, YO, and intl attendees	250 distributed and picked up

## In-Booth Events and Promotions

The in-booth events and promotions satisfy the overall Resource Center objectives of **community**, **brand** and **sales**. The event goals also roll up into the departmental goals outlined in Section III.

As was articulated in course **20615: Show Operation Basics – Part I: Pre-Show Planning**, advertising sets the stage and PR builds acceptance, but it is events that are the immersive brand experience. In-booth events and promotions create buzz and draw visitors who might not otherwise make time to stop by. These activities also give us something to talk about in our advertising vehicles.

During AAO 2016, we attracted attendees to our booth via the following events and promotions.

AAO 2016 RESOURCE CENTER IN-BOOTH EVENTS AND PROMOTIONS GOALS			
Communication Method	Rationale	Target Audience	Measurable Goal
Event: IRIS Registry	Education	U.S. member physicians	75 engaged attendees
<i>New in 2016:</i> Event: Foundation	Appreciation, awareness, conviction	Donors, members	75 engaged attendees, 2 donations
Event (2): Journals	Appreciation, very targeted, inexpensive	Reviewers	20 attendees
Event: EyeCare America®	Appreciation, very targeted	ECA volunteers	50 attendees
<i>New in 2016:</i> Event: Clinical Webinars	Awareness, conviction, information	Physicians	50 engaged attendees
Promotion: 10% at-show discount	Sales	All RC attendees	Sales of \$375k+ (\$355k at show)
Promotion: 10% post-show discount card	Sales	All RC attendees	Sales of \$20k+ (incl in overall sales)
Giveaway: Academy pens	Appreciation, brand awareness	Attendees who have interactions with staff	All 3,500 pens given away
Giveaway: Academy totes	Appreciation, brand awareness	Attendees who purchase product	Up to 500 totes given away

## Post-Show Communication

Post-show communication satisfies the overall Resource Center objectives of **brand** and **service**.

After AAO 2016, I followed up with attendees via the following communication method.

AAO 2016 RESOURCE CENTER POST-SHOW COMMUNICATION GOALS			
Communication Method	Rationale	Target Audience	Measurable Goal
<i>New in 2015:</i> Customer satisfaction survey, email	Free, opp to provide feedback, ask questions	Attendees who made a purchase	Open rate 55%; response rate 12%

## IMC SAMPLES AND PHOTOS – PRE, ONSITE, AND POST

Below is a sampling of the various communications we send to encourage attendance and sales at the Academy Resource Center. We aim to be as consistent as possible in our messaging and artwork. *(For additional samples, see Appendix, pages xiii–xvii.)*

### Pre-Show Communications

**Mailed Postcard** (front, back) — Sent to all AAO 2016 preregistrants.



Webpage (partial) — [www.aao.org/annual-meeting/exhibition/resource-center](http://www.aao.org/annual-meeting/exhibition/resource-center)

[Annual Meeting](#) [Clinical Education](#) [Practice Management](#) [Member Services](#) [Advocacy](#) [Foundation](#) [About](#) [Specialties & More](#) [Eye Health](#)



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AAO 2016

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AAO 2016 / [Exhibition](#) / [Academy Resource Center](#)

## Academy Resource Center

### Booth 508

**Saturday, Oct. 15 - Monday, Oct. 17, 9 a.m. - 5 p.m.**  
**Tuesday, Oct. 18, 9 a.m. - 1 p.m.**

Find innovation solutions for your practice at the Academy Resource Center.

During AAO 2016, the Academy's entire collection of innovative products and resources are on display at the Academy Resource Center. Academy staff members are on hand throughout the exhibit to answer your questions and help you zero in on the resources that will be most useful for your practice.

### Academy Forum

Visit the **Clinical Education Demos kiosk** for a live demonstration of the largest online community for ophthalmologists, and learn how you can benefit by sharing your expertise with your colleagues from around the world.

### Academy Store

All Academy products are available for purchase at the **Academy Store**. Most products can be picked up the same day, or you can have your order shipped to you. During AAO 2016, enjoy 10% off all product purchases.

### Advocacy

Visit the **Advocacy desk** to send a letter to Congress, get a legislative/regulatory update and find out how OphthPAC and the



1 Cristello, Karen

1 Alert

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xiidra  
Xenetic  
ophthalmic solutions

COMESAY III

Video Ad/Testimonial — Promoted on webpage, in emails: [www.youtube.com/watch?v=w0RXA2Ywcck](http://www.youtube.com/watch?v=w0RXA2Ywcck)



## At-Show Communications

Print Ad — *EyeNet Magazine, EyeNet Exhibitor Guide, Meeting Program, Subspecialty Day syllabi*



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Talk to experts about **MACRA**  
and **MIPS**

**Explore** the Academy's Ophthalmic  
News and Education (ONE®)  
Network and IRIS® Registry  
(Intelligent Research in Sight)

**Get** expert practice management  
and coding advice

**Personalize** the Academy's  
patient education videos at the  
Video Production Studio

**Renew** your Academy, ISRS  
or AAOE membership – or join

### Don't Miss These Special Events:

**Using the IRIS® Registry:  
Access, Analyze, Act**  
Saturday, Oct. 15, 2 – 3 p.m.

Uncover clinical insights into your patient  
population.

**Academy Foundation Donor Reception**  
Saturday, Oct. 15, 4 – 5 p.m.

Learn about the Foundation's worldwide  
impact and meet Academy leaders.

**Ophthalmology® and Ophthalmology®  
Retina: Meet and Greet the Editors**  
Sunday, Oct. 16, 1 – 3 p.m.  
Monday, Oct. 17, 9 – 11 a.m.

Authors and peer reviewers: Stop by  
and meet the editorial board.

**EyeCare America® Volunteer Reception**  
Museum of Vision, Booth 704  
(next to the Resource Center)  
Sunday, Oct. 16, 3 – 5 p.m.

Get to know your EyeCare America  
volunteer colleagues.

**Introducing Clinical Webinars:  
Meet the Experts**

Monday, Oct. 17, 10 – 11 a.m.

Meet the member volunteers creating the  
Academy's new clinical webinar series.

Find Innovative  
Solutions for  
Your Practice at  
the Academy  
Resource Center

**Booth 508**



Save 10% on products  
at the Academy  
Resource Center



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**Find Innovative Solutions for Your Practice at the Academy Resource Center**

- ➔ Sample new products
- ➔ Demo digital resources
- ➔ Speak with experts
- ➔ Learn at special events

Save 10% on products at the Academy Resource Center



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Welcome to the Academy Resource Center

Share Your Experiences and Learn From Peers

**TODAY'S EVENTS:**

**Save 10% on products**  
No minimum purchase required.

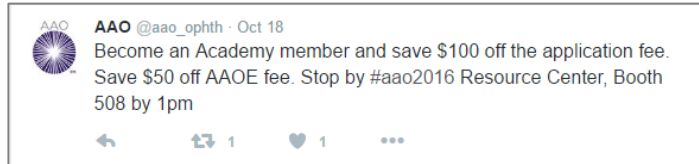
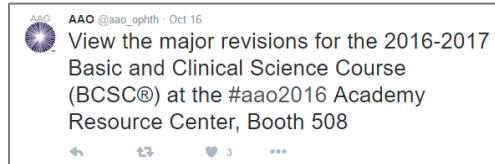
**2:00 – 3:00 PM**  
**Using the IRIS® Registry: Access, Analyze, Act**

Get clinical insights into your patient population by asking questions with the IRIS Registry's innovative analytics module, demonstrated by member leaders.

**4:00 – 5:00 PM**  
**Academy Foundation Donor Reception**

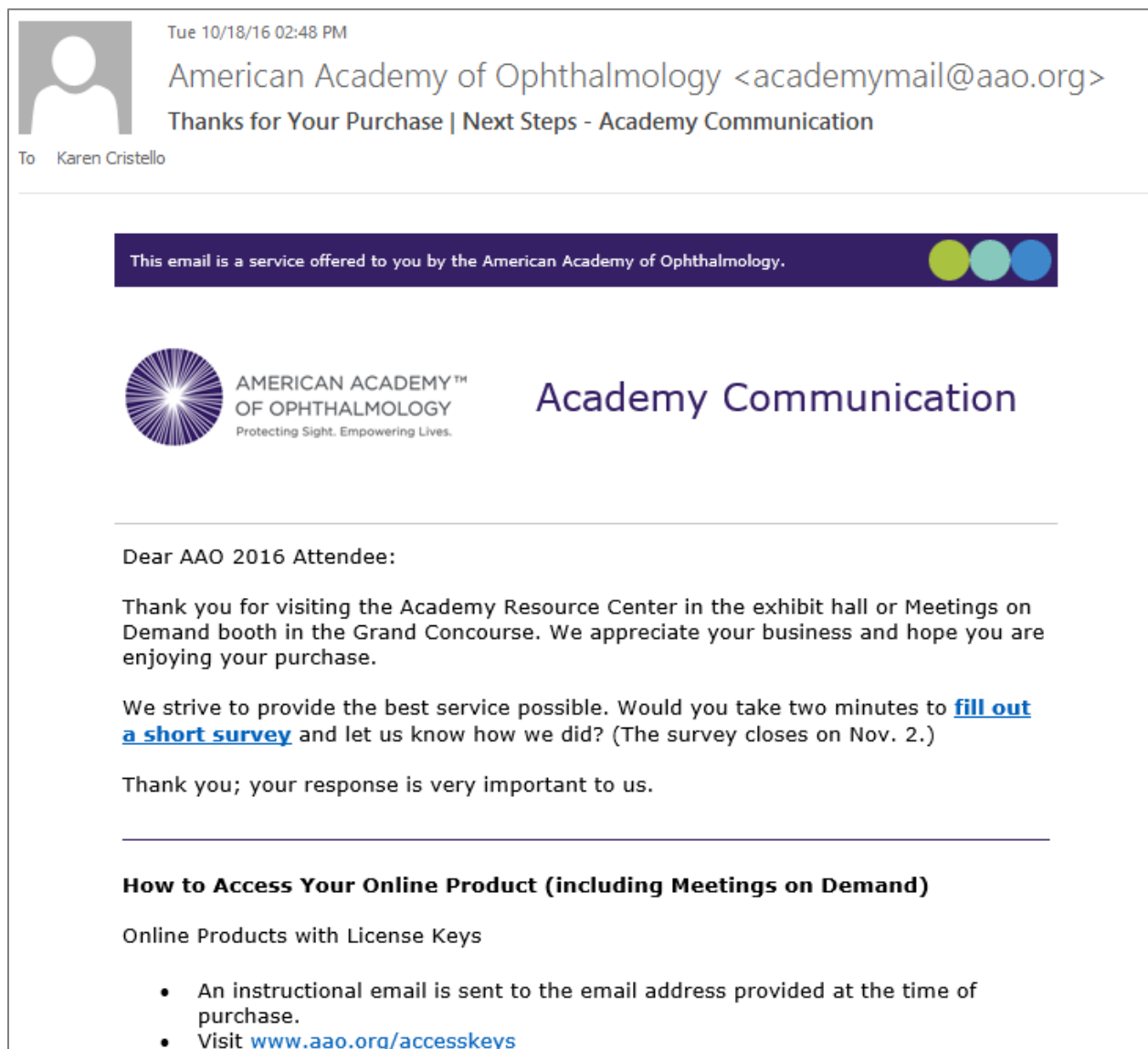
As a special thank you, the Academy Foundation invites its donors to meet Academy leaders and enjoy refreshments.

Tweets — [https://twitter.com/aao\\_ophth](https://twitter.com/aao_ophth), #AAO2016



## Post-Show Communications

**Customer Satisfaction Survey Email** (partial) — Including reminder instructions on how to access online products; sent to everyone who purchased product during AAO 2016.



## MISCELLANEOUS MARKETING AND COLLATERAL

Collateral and other marketing devices are more internal, in that they are not discussed or promoted, though attendees see evidence of it. Though its existence is not broadcast to attendees, it is an important component that contributes to the booth environment and helps us achieve our goals, especially for branding. Collateral pieces satisfy the overall Resource Center objectives of **business**, **brand**, and **sales**. We reinforced our brand through the following collateral items:

- Prime location (near entrance/registration)
- Rotating videos on New From the Academy Monitor
- Daily events listed on meter panels in the Resource Center
- Branded collateral (order forms & signs, “reserved” signs, handouts, product fact sheets, etc.)
- Staff shirts – Purple, with Academy logo
- B-roll and photography – Shot to promote the following year’s meeting/Resource Center

## RESOURCE CENTER STAFF TRAINING

We have almost 100 staff, consultants, and temps who work in the booth at least part-time. Staff performance — and therefore, training — is a huge component in achieving our sales and service objectives, and a significant part of my Resource Center responsibilities. I conduct or organize four types of training sessions: Overview, Product, Advanced, and Walk-Through.

### Overview Sessions

I conduct four two-hour Overview sessions (same content, choice of four times), required for all Academy staff and encouraged for consultants. I review all exhibition and booth details, including places of interest in the convention center and on the show floor, booth hours, staff break room and lounge, dos and don’ts, who’s who, goals for each kiosk/desk, what’s new or discontinued, marketing, events/promotions, and top attendee questions.


Starting in 2015 and fine-tuned in 2016, I now cover a bit of brand “acquaintance” in the Overview. Because we are newly rebranded, it is more important than ever to have a unified understanding of who the Academy is. Course **31115: How to Grow Your Brand: Incorporating Brand Marketing into Your Exhibit Program** reinforced my opinion that brand-training is critical, and provided some ideas that I was able to convey in training to help staff understand that we are more than a logo or color palette: Brand is the *collective* perception held by the consumer of the *total* experience related to doing business with an organization or consuming a product or service; events and tradeshow are the front lines of brand building; and specific behaviors reinforce the brand.

Generally, our staff are really great, representing the brand well and doing everything they can to best help our customers. However, attendance has been a slight problem in the past — staff showing up late, not being ready to go by 9 a.m., or even leaving their desk/kiosk unstaffed. I discuss these things in training, but in their heads, they’re probably thinking, “yeah, whatever.” Thanks to course **30815: Business Marketing Strategies and Trade Shows**, I now have a better way of presenting this idea: It’s bigger than me — it’s our brand, and this type of behavior is against our brand strategy. How do we steal business from our competitors? In part, by being our brand ideal. This is very important, as one little thing can ruin an experience.

I'm always striving to make my training sessions more engaging, and course **221: Are You Game? New Approaches to Exhibit Staff Preparation** provided some inspirational ideas to do that. Thus, in 2015, rather than presenting Dos and Don'ts as a boring list, I presented before and after photos, asking staff to identify all the undesirable behaviors, then all the good ones. This change made the exercise much more interactive and fun. In 2016, rather than quizzing the whole group after each section, I added lightning rounds to the middle and end of the session, during which everyone partnered up and raced to ask and answer quiz questions in pairs. Not only was this more interactive, but it got every single person participating. Plus, I offered prizes (Starbucks gift cards) to the winning pairs, which added an element of competition.

### Resource Center Don'ts

- Sylvia's working in a busy Resource Center.
- How many fashion and behavior "don'ts" can you find?

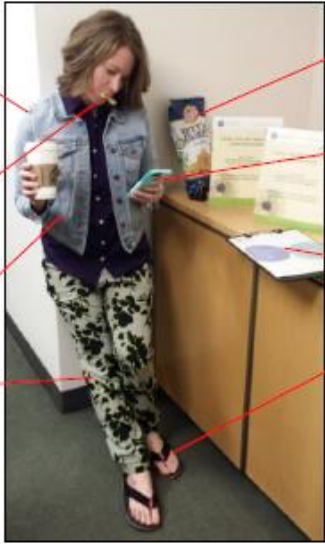


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**Resource Center Don'ts and Dos slides from the Overview presentation.** Above: Session attendees identify as many don'ts as possible. Below: Answers are confirmed; dos are emphasized.

### Resource Center Don'ts



Don't wear a blazer or sweater over your shirt.  
Also, don't wear a logo shirt and logo sweater together.

No food – eat in the break room, closet or staff lounge.  
Beverage OK but keep it hidden.  
No gum. Breath mints OK.

No slouching, leaning or other unwelcoming body language.

No patterns or "other" colors. Stick to solids.

Don't put food/ beverages on the countertops.

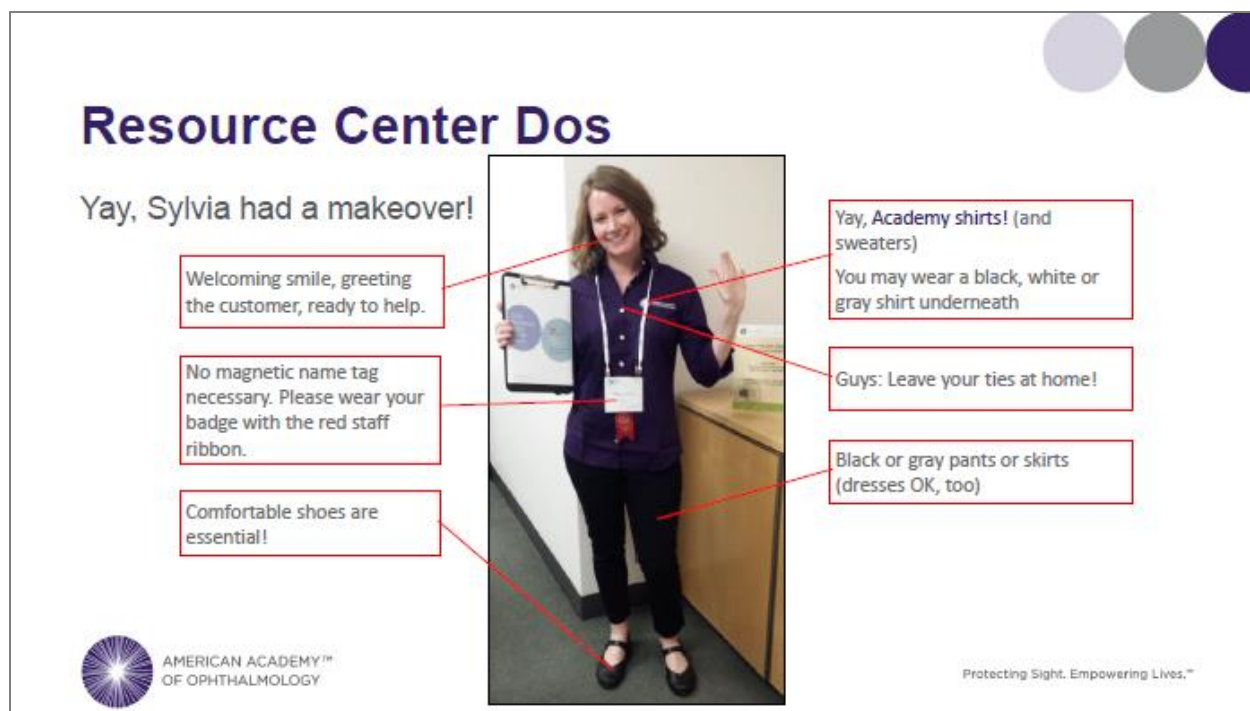
Absolutely no personal cell phone calls or text messaging while you're working on the floor. Keep mobile devices on vibrate.

Please help keep the Resource Center tidy! Especially during events.

No denim, sneakers or flip-flops except for set-up and tear-down

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## In-Depth Product Sessions

**2015.** In the past, I had left in-depth product training up to the product managers to organize and conduct. This was not effective, as many staff reported that they received insufficient training or none at all. With this model, there was also no opportunity for cross-training. To better educate our product sales staff, I decided to start teaching these sessions myself in 2015.

I now offer four different two-hour sessions on Clinical Education digital, Clinical Education print, Patient Education, and AAOE practice management products. The relevant sessions are required for all product staff and encouraged for consultants. Staff are also encouraged to attend sessions as cross-training for their non-primary areas. I review all products, including features, benefits, selling points, and FAQs. Product managers also help by providing input for their products.

**2016.** Though I'm positive our staff received more education than before, our service stats didn't reflect much difference. As I learned in course **10516: Using Surveys to Measure Your Performance in Trade Shows and Events**, booth personnel are key to successful exhibit performance — and *poor* personnel performance, especially a lack of product knowledge, is the number one reason attendees rate a booth experience poorly. So, in a greater effort to increase our staff's product knowledge and boost our service ratings, I made improvements to increase the effectiveness of the sessions in 2016.

2015 feedback indicated that some staff hadn't been aware that they could attend other sessions, so in 2016 I made it clear that cross-training was an option. With the cooperation of the product managers, I also created flash cards for every product, which were distributed to all Resource Center staff. And, as in the Overviews, I added some fun at the end. First was a game of Password, and I rewarded winning pairs with Starbucks gift cards. In sessions that still had remaining time, we did a role-play between "attendee" and staff, and/or quiz questions.

## Resource Center Survival Workshop

I'd hired an outside consultant to provide "advanced" training a couple times in the past, but in 2014 and 2015 my budget could not support it. I was happy to be able to add it back in in 2016. My first choice came in a little high for my budget, but thanks to course **72116: Negotiating Skills to Win**, I won! I (an analytical negotiator) secured Matt Hill (an amiable negotiator) from the Hill Group, who covered non-logistical details, focusing more on skills for engaging, disengaging, attracting prospects, how to act/interact, qualifying leads, how to stay motivated, etc. This session was required for our approximately 50 staff who have primarily interactional responsibilities (as opposed to stockers, line control, cashiers). Consultants were invited, but not required, to attend.

## Onsite Booth Walk-Through

I organize one booth walk-through on site, which Brandi leads. It is recommended for all staff and consultants, especially first-timers. We review what's where, who's who, giveaways, promotions, and answer any last-minute burning questions.

## MARKETING COMMUNICATIONS RESULTS

As they are not events or communications, some of these activities are more difficult to measure, or the goal is achieved through a combination of activities. Also, though "none" is listed for many recommendations, messaging can *always* be improved; in these cases, there aren't any specific improvements since the communications achieved their goals.

## Pre-Show Communications

RESULTS FOR IMC ACTIVITIES AND GOALS – PRE-SHOW COMMUNICATIONS				
Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
Blurbs in AAO 2016 email blasts	Included in at least 3 emails	Emails	Included in all 3 but as part of Meetings on Demand blurbs.	In 2017, at least one should be about all of RC
Blurb in registration confirmation email	Included in all confirmations	Test confirmation	Included in all confirmations	None
Blurbs in Academy Express	Click-throughs (CT) 1%	Blast report	21,958 recipients; 7,413% unique opens; 8 CT (0%)	Improve messaging w/ compelling reason to click
Booth description in Virtual Exhibition	Populated by 9/01	Check on 9/01	Populated by 9/01	None

(continued)

Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
Webpage	750 page views (5% of projected attendance)	Web report	1,174 visitors 1,374 page views	Continue to create more compelling messaging; action
<i>New in 2016:</i> Video Ad/ Testimonial	1,000+ impressions	YouTube & web report	YouTube: 147; web: 154	More compelling headline/lead-in
<i>New in 2016:</i> RC page in badge mailing brochure (replaced RC mini-brochure)	12,500+ impressions	Confirm that brochure was included in all registration packets	12,500+ impressions	Make messaging more consistent with our ads, postcards, etc.
<i>New in 2015:</i> 2-pg spread in Fall product & resource catalog	23,000+ impressions	Confirm distribution	23,000+ impressions	Continue to hone messaging
Card in card pack	12,500+ impressions	Confirm distribution	12,500+ impressions	None
<i>New in 2016:</i> Blurbs in Practice Management Express	Click-throughs 1%	Blast report	Due to staffing changes and challenges, the blurbs were not included	Try again next year
RC Postcard	10,000+ impressions	Confirm that all postcards were mailed	9,008 domestic; 5,020 intl = 14,028 impressions	None
Twitter/Facebook/LinkedIn	T: at least 5 retweets; FB: at least 10 shares	Check T and FB posts	T: most likes – 3, most retweets – 1. F: no posts	Work on more compelling, shareable messaging; work with communications to make sure FB posts are posted.
Dedicated Email blast	Open rate 41%, click-throughs 3%	Blast report	11,776 addresses; 4,258 OR (36%); 257 CTs (2%)	Work on more compelling subject lines; more concise messaging
AAO.org spotlights	Posted by deadlines	Check website	Cancelled by communications	Try again next year

## At-Show Communications

RESULTS FOR IMC ACTIVITIES AND GOALS – ONSITE COMMUNICATIONS				
Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
Ad: <i>EyeNet Magazine</i>	43,000+ impressions (21k on mailing list; 22k in reg bags)	Confirm distribution	43,000+ impressions (21k on mailing list; 22k in reg bags)	None
Ad: Subspecialty Day Syllabi (8)	7,500+ impressions	Confirm distribution	7,500+ impressions	None
Ad: Meeting Program	17,000+ impressions	Confirm distribution	17,000+ impressions	None
<i>New in 2016:</i> Ad: <i>EyeNet Exhibitor Guide</i>	15,000+ impressions	Confirm distribution	15,000+ impressions	None
Hotel door drop brochure	11,800 impressions	Confirm distribution	11,800 impressions	None
Session room walk-in slides	Slide included in each room's deck	Confirm that slides were included	Slide included in each room's deck	None
Twitter/Facebook /LinkedIn	T: 10+ retweets; FB: 20+ shares	Check T and FB posts	T: most likes – 3, most retweets – 1. F: no posts	Work on more compelling, shareable messaging; work with communications to make sure FB posts are posted.
<i>New in 2015:</i> Daily event meter panels at front of booth	Placed from open to close each day	Confirm placement	Placed from open to close each day	None
<i>New in 2015:</i> Meter panels in Grand Concourse	Placed by 5pm Friday and kept up through end	Confirm placement	Placed by 5pm Friday and kept up through end	None
Page in Mobile Meeting Guide	100+ impressions	Report	Not able to get data by press time	Continue efforts next year
<i>New in 2016:</i> Catalogs @ Meeting Info desks	200 delivered (impressions are included in the pre-show goal)	Confirm delivery	200 delivered	None
2-pg feature in <i>Academy News</i>	13,000+ impressions	Confirm distribution	13,000+ impressions	None

(continued)

Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
Premium listing in <i>EyeNet Exhibitor Guide</i>	15,000+ impressions	Confirm distribution	15,000+ impressions	None
Blurb in <i>EyeNet Academy Live</i>	43,000+ impressions	Blast report	43,000+ impressions; RC blurb not included but MOD/RC was	Try again next year; combine RC and MOD
Screensaver for Rest Stop monitors	Loaded on all computers	Confirm w/ IT staff	Loaded on all computers	Only created for CE, AAOE and events. Next year make sure one is created for PE as well.
Postcards in AAOE, SO, YO, and Intl lounges	250 distributed and picked up	Confirm distribution	250 distributed and picked up	None

## In-Booth Events and Promotions

RESULTS FOR IMC ACTIVITIES AND GOALS – IN-BOOTH EVENTS AND PROMOTIONS				
Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
Event: IRIS Registry	75 engaged attendees	Headcount	75+ attendees and at least half were engaged	Area was packed so can't fit more. Speakers should be louder though.
<i>New in 2016:</i> Event: Foundation	75 engaged attendees, 2 donations	Headcount, count donations	75+ attendees, including a lot of big names. No donations.	Event was geared toward donors who already gave. Make stronger efforts to engage attendees who have not donated.
Event (2): Journals	20 attendees	Headcount	20-30 attendees	None
Event: EyeCare America®	50 attendees	Headcount	40, est.	Make greater efforts to notify volunteers

(continued)

Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
<i>New in 2016:</i> Event: Clinical Webinars	50 engaged attendees	Headcount	50+ attendees, expected levels of engagement, plus got a new presenter, but only 1 sale.	Make it more educational – tie in a talk.
Promotion: 10% at-show discount	Sales of \$375k+	Sales report	\$462,731 – 23% over goal!!!	This is the result of the cumulation of all of the other efforts combined, plus marketing throughout the year. Keep it up!
Promotion: 10% post-show discount card	Sales of \$20k+ (incl in overall sales)	Sales report	\$12,503 (as of 10/26; one-week results)	This promo works well; continue same
Giveaway: Academy pens	All 3,500 pens given away	Confirm distribution	All 3,500 pens given away	None
Giveaway: Academy totes	Up to 500 totes given away	Confirm distribution	About 250 given away	None; this isn't really a goal we have to achieve; it's OK to give away fewer. It's more important that we offered them and they were branded properly.

## Post-Show Communications

RESULTS FOR IMC ACTIVITIES AND GOALS – POST-SHOW COMMUNICATIONS				
Communication Method	Measurable Goal	Assessment Method	Results	Recommendations for Improving Communication
<i>New in 2015:</i> Customer satisfaction survey, email	Open rate 55%; response rate 12%	Blast report, survey results	1,055 addresses; 554 OR (52%); 164 CT (16%); response rate 4% (as of 10/26; one-week results)	Work on more enticing messaging

## MARKETING COMMUNICATIONS BUDGET

Since AAO 2016 is our meeting, we have the luxury of most of our promotions being free. Therefore, our list is short and sweet. Anything not listed here was free — it was truly no cost (such as emails), or was given to us for free (such as ads in Academy magazines or programs) or was paid for by another department or program (such as the RC page in the badge mailing brochure, or events).

We came in quite a bit under. This was mostly due to the raffle being cancelled, overestimating postcard postage, not needing to combine the rotating videos, lower product costs, and ordering fewer totes.

BUDGET FOR AAO 2015 ACADEMY RESOURCE CENTER – IMC/Marketing Dept.			
Line Item	Budget	Actual	Variance
Staff training	\$ 6,250	\$ 6,375	(2%)
Office Supplies	\$ 200	\$ 691	(245%)
Badge brochure ( <i>cancelled</i> )	\$ 2,700	\$ 0	100%
Resource Center postcard	\$ 7,400	\$ 3,994	46%
Hotel door drop brochure (1/4 <sup>th</sup> )	\$ 1,475	\$ 1,040	29%
10% discount card (only), raffle card ( <i>cancelled</i> )	\$ 1,490	\$ 877	41%
Rotating videos on New From the Academy monitor	\$ 500	\$ 0	100%
Ad: <i>EyeNet Magazine</i>	\$ 231	\$ 231	0%
2-page spread in Fall product & resource catalog	\$ 2,000	\$ 1,904	4%
Academy logo pens	\$ 8,000	\$ 7,793	3%
Academy logo totes	\$ 2,250	\$ 1,685	25%
Raffle prizes ( <i>cancelled</i> )	\$ 2,000	\$ 0	100%
Product Samples (cost/COGS)	\$ 1,400	\$ 296	78%
New: Meter panels in Grand Concourse	\$ 0	\$ 770	(100%)
In-Booth Daily Event Meter Panels	\$ 0	\$ 1,155	(100%)
Branded collateral (order forms & signs, “reserved” signs, handouts, product fact sheets, etc.)	\$ 100	\$ 32	68%
Staff shirts (marketing dept only)	\$ 360	\$ 369	(3%)
<b>TOTAL</b>	<b>\$36,256</b>	<b>\$27,212</b>	<b>25%</b>

## VI: Management of Results Reporting

### RESULTS AND RECOMMENDATIONS OVERVIEW

Assessing our performance in the Academy Resource Center is crucial to understanding how our strategies and tactics performed so we can make improvements in future years.

The tables below show the results and recommendations for our corporate and overall marketing goals. *(For individual desk/kiosk results, see Appendix, pages xviii–xx.)*

RESULTS AND RECOMMENDATIONS FOR THE ACADEMY RESOURCE CENTER AT AAO 2016					
Corporate (CEO, VPs; brand, mission)					
Measurable Goals	Strategies	Tactics	Assessment Methods	Results	Recommendations
Increase perception of Academy as community	Provide a relaxing member oasis	Sofas, tables/chairs, water, magazines	Observation	All tactics fulfilled; attendees enjoyed relaxing and meeting	Stay the course
Enable members to complete all Academy business efficiently	Be the one-stop shop for everything Academy	All departments represented, well-staffed	Observation of staffing presence & levels	Better staffed than usual; no stations left unattended; shorter wait times; greeted more timely	Continue same staffing level, esp PE
Increase awareness and positive perceptions of our new brand	Booth, staff, product, events – everything breathes the brand	Booth art, brand video, branded collateral, ‘astute’ communication, purple shirts	Brand Team observations	Everything in sync and rebranded	Stay the course

*(continued)*

Marketing (overall booth)					
Measurable Goals	Strategies	Tactics	Assessment Methods	Results	Recommendations
Total sales of products and services: \$375,000	<ul style="list-style-type: none"> <li>• 10% discount</li> <li>• Knowledgeable staff</li> <li>• Generate booth traffic</li> </ul>	<ul style="list-style-type: none"> <li>• Automatic onsite discount &amp; post-show discount card</li> <li>• Invite staff to cross-training sessions; add FAQs/flash cards</li> <li>• Pre-show/ onsite promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Post-show sales report</li> <li>• Records of promo items (IMC results)</li> <li>• Staff training attendance &amp; survey</li> </ul>	\$462,731 + \$12,503 (as of 10/26; one-week results) = 475,234 – 26% over goal!	Stay the course: continue to offer discount; invite staff to cross-train; make training interactive; promote RC as in the past; and promote throughout the year.
Achieve levels of service equal to or better than 2015 <ul style="list-style-type: none"> <li>• Service ≥87%</li> <li>• Knowledge ≥83%</li> <li>• Finding P/S ≥81%</li> <li>• Ordering ≥88%</li> </ul>	Provide exemplary service, accurate information	<ul style="list-style-type: none"> <li>• Comprehensive training to tackle FAQs</li> <li>• Advanced skills training w/ outside contractor</li> </ul>	<ul style="list-style-type: none"> <li>• Post-show purchasers survey</li> <li>• Staff training attendance &amp; survey</li> </ul>	<ul style="list-style-type: none"> <li>• Service 91%</li> <li>• Knowledge 89%</li> <li>• Finding P/S 86%</li> <li>• Ordering 89%</li> <li>• (as of 10/26; one-week results)</li> </ul>	Continue to offer comprehensive, engaging training, with advanced training every other year.

## ASSESSMENT METHODS & RESULTS

Activities that have an associated report are easy to measure — for example, our sales are easy to assess because we can run a report at the end of the day and get a definitive, quantitative measurement.

Other, qualitative goals are harder to measure. In course **117: You Know What to Measure — But How Do You Actually Measure It?**, measurement options that I considered were observations and surveys. (As noted in Section III, we don't focus on leads; Radio Frequency Identification [RFID] is not a viable option for us yet; and social media isn't a good measurement tool for our situation.)

**NOTE:** AAO 2016 ended on Tuesday, Oct. 18; and the post-show discount, purchaser survey, and training survey all had deadlines of Wednesday, Nov. 2. However, I needed to print this portfolio on Oct. 26 to make the Nov. 1 submission deadline, so am only able to include one week's worth of results for post-show sales, purchaser survey results, and training survey results.

## Post-Show Sales Reports

Our sales goals are adjusted every year, based on expected attendance, number of new products, types of products, and the clinical and regulatory environment. (For example, right before the 10,000+ new ICD-10 codes were expected to go into effect, our ICD-10 product sales skyrocketed.) Therefore, our year-over-year sales aren't as significant as is meeting a year's particular goal.

At AAO 2016, our sales goal was **\$375,000**, which included \$355,000 at-show and \$20,000 post-show, with a discount card handed out on site that was good for two weeks. At show closing, sales were already \$462,731, which was 23% over our total goal. One week later, our post-show discount had brought in \$12,503, bringing us to **\$475,234** and **26%** over goal. I was very surprised about these results. This puts us on par with Las Vegas 2015, where professional attendance was 15% higher, and is the second-best we've done since 2009. I attribute these excellent results to improved staff training, expanded Resource Center marketing efforts with improved messaging, and improved product marketing throughout the preceding year. *(For detailed sales reports, see Appendix, pages xxi–xxii.)*

## Observations

Our corporate goals are not as easily measured, as they are not quantifiable. Therefore, during AAO 2016, I made observations to assess the success of our tactics (I am also a member of the Brand Team, so I made brand observations as well). Indeed, it appeared that we did carry out all our tactics as planned, including staffing levels, which has been a problem in the past; and full-on, correct branding, which was a new concept to most of our staff. Therefore, I would surmise that our strategies were a success and our goals were achieved.

## Post-Show Purchasers Survey

The Academy changed its attendee survey in 2015, including eliminating Resource Center questions, so I created my own. I was glad to learn in course **10516: Using Surveys to Measure Your Performance in Trade Shows and Events** that post-show lead surveys are best suited for the internet immediately following the show, among the leads obtained at the show, as it fit perfectly into my assessment tactics. Although, rather than leads, which we don't collect, I targeted everyone who purchased a product in the Resource Center. I also learned that the average response rate is 12–15%, so now I know what I should aim for. In 2015, I only got a 9% response rate, so my goal in 2016 was to get at least **10–12%**. To achieve this, I made sure the survey email was sent in a timelier fashion and I came up with a more enticing subject line. After one week, I had 44 responses out of 1,055 surveys sent (**4%**).

As for the actual preliminary survey results, they are (based on responses of Excellent or Very Good):

- Service of Academy staff: **91%** — 4% over 2015 — goal achieved!
- Knowledge of staff about products and services: **89%** — 6% over 2015 — goal achieved!
- Ease of finding products and services: **86%** — 5% over 2015 — goal achieved!
- Ease of ordering products: **89%** — 1% over 2015 — goal achieved!
- Net promoter score: **65.9** — 2.1 under 2015 — goal not achieved

I am quite shocked at these results; I had been hoping for much smaller increases, and it's the first time we've gotten over 90% in any area. I believe that these improvements were a direct result of the improvements I made in the various training sessions, and the inclusion of the advanced skills Survival

Workshop: staff were better informed and prepared to help our attendees find appropriate solutions for their needs. *(For detailed survey results, see Appendix, pages xxiii–xxiv.)*

## Staff Training Attendance and Survey

Staff knowledge and attitude play a key role in their performance, which in turn impacts sales and attendee satisfaction. Each year, I ask the same questions so I can keep accurate comparisons from year to year. In the past, there was always a delay of a few days to a week after show-end. In 2016, I made sure I sent the survey within a few hours of the show's closing. My hope was that more staff would complete the survey and would find it easier to answer the questions, with all the trainings and actual show fresh in their minds.

After one week, 23 staff had responded (compared to 38 respondents in 2015). Results of the survey were excellent, with many positive comments about the games, flash cards, and Survival Workshop.

The results, based on ratings of Excellent or Very Good:

- Helpfulness of Survival Workshop: **30%** (n/a in 2015)
- Helpfulness of Overview: **76%** (50% in 2015)
- Helpfulness of Product Training: **88%** (58% in 2015)
- Helpfulness of Walk-Through: **86%** (62% in 2015)

Again, these results exceeded my expectations, and I attribute them to the improvements I made in the Overview and Product training sessions. *(For detailed survey results, see Appendix, pages xxv–xxvi.)*

## Records of Promo Items (IMC results)

Part of achieving our sales goal involves getting bodies into the booth. To generate traffic, we produced myriad integrated marketing communications pieces. As demonstrated in Section V: Management of Integrated Marketing Communications, our communications in 2016 were very successful. If there was any shortage of sales, it would not be due to lack of effort or success in this area.

## RESULTS REPORTING

**To Resource Center Staff.** I was inspired by course **320: Tate & Lyle: A Taste of Trade Show Marketing Excellence** to increase my efforts in communicating our results to our Resource Center staff. When they are more informed, they're more likely to care about what's at stake, and to see how they're succeeding in helping our whole team reach our goals. To this end, in 2015, I added a whiteboard to the Resource Center break room, where I post our daily sales achievements and other announcements. Staff are also encouraged to write their announcements and feedback. I sent a final email to all Resource Center staff with our sales results, and in 2016, I made sure I also communicated our customer satisfaction results.

**To Other Key Stakeholders.** I additionally share our sales and satisfaction results with the Resource Center Advisory Team (RCAT; reps from each desk/kiosk) and the key planning team (Meetings & Exhibits VP and Promotions Manager, VP of Communications & Marketing, and Director of Marketing), via the Resource Center staff email and meetings. The RCAT does an overall debrief of the whole booth and show, and the key planning team considers the results for the next year's planning. In 2016, I

expanded reporting to a much broader audience by including a thank-you/results article in *Focus*, our company's all-staff weekly newsletter. This also gave me the opportunity to express my gratitude and recognition to all our colleagues for the difficult job the Resource Center staff do.

## RECOMMENDATIONS

**Corporate Objectives.** With our current Resource Center structure and budget, our corporate objectives were well-satisfied and I recommend staying on our current course. With time and our new brand communication guidelines, the sense of community and positive brand perceptions will continue to grow. The Resource Center is just one manifestation.

**Sales and Service Goals.** I also think we are on the right track here. Of course, more sales are always great. This could be done with a broader range of product offerings, or publishing in more languages, but those initiatives are beyond what we can achieve with Resource Center planning and involve many other considerations, from production costs, to staffing levels, to corporate goals and commitment levels. I don't believe that more discounts will result in more profit, and aside from calling all our 33,000 members individually, we are doing as much pre-/at-show promotion as we have the budget and staff bandwidth to do. That said, we will continue to improve the quality of our communications – subject lines, headlines, value propositions, etc.

**Staff Training.** I do think that there is always room for improvement in staff training. There are ways to make it more engaging (including more quizzes, games, and interactive presentations) and I will continue to work on building staff and supervisor commitment and enthusiasm. Ideally, I'd love to get *all* our service ratings at 90% or above.

## VII: Conclusion

### ASSESSMENT OF AAO 2015 and AAO 2016

Over the five and a half years I've held this job, and especially over the last year and a half in the CTSM program, I've made numerous improvements to marketing operations for the Academy Resource Center. I've enhanced staff education, guided a team that usually met or exceeded sales goals, increased visitor satisfaction ratings, and encouraged an environment of helpfulness, enthusiasm, and teamwork. I've also refined our messaging, increased communications and promotions, successfully introduced the new branding to the booth, clarified goals, and improved record-keeping and results reporting.

The Academy Resource Center at AAO 2015 and AAO 2016 was a huge success. As delineated in Sections V and VI, we met most of our goals and performed exactly as expected. We are a well-oiled machine with conscientious, dedicated staff, and I have no doubt that we will continue to succeed.

I'm more concerned about how we can be truly amazing in the future. How can we become the talk of the show? How can we become the year-after-year, don't-miss booth that gets 99% of total show attendance? This is what will elevate the Academy in attendees' eyes, what will help position us as the most-sought-after global ophthalmological association, and what will help us grow and retain our membership.

### RECOMMENDATIONS FOR CHANGE AND IMPROVEMENT

Generally, I think we're on the right track. In Section VI I reviewed some changes I'd like to make, most notably by continuing to improve training sessions in order to get our service ratings at or above 90%. With our current booth structure and budget, we won't be able to make any major changes to the booth until 2020, and those changes will depend on how much our Board of Trustees approves.

**Back-Lit Graphic Panels.** In an ideal world, there are many changes I'd like to incur to the Resource Center of the Future to better illustrate the Academy's **leadership**, **innovation**, sense of **community**, patient **impact**, and member **success** (all Academy new-brand keywords). Although our booth is very attractive and stylish, it feels outdated. For our next incarnation, I envision back-lit panels where we could change the graphics from year to year and include brief promotional messaging, thus calling out a benefit and drawing better attention to particular products or services. These graphics would help visitors find what they're looking for, as well as communicate the concepts of our keywords, and could feature our actual members and patients rather than stock photography (which is more on-brand).

**Modular Structure.** Our current booth is also very rigid, in that we are not able to (easily or at all) change structures, presentation media, graphics, signage, or layout. For our next booth, I'd like all these things to be more flexible. I imagine modular units that we could morph every year according to what kinds of products we're selling and what we want to highlight. This flexibility will be increasingly

important as more of our products go digital, and as technologies evolve more and more rapidly over the years.

**Interactive Experiences.** I'd also really love to incorporate some kind of interactive experience into our booth to help visitors feel a more intimate connection with our brand. Course **30715: *Creative Thinking to Reinvigorate Your Program*** was incredibly inspirational and made me wish the Academy had a money tree. This course gave me two great ideas from other medical/healthcare booths. In one example, a pharmaceutical company gave customers an opportunity to feel what it's like to have a heart attack. In another, Eli Lilly's oncology division invited cancer survivors to paint pictures and write stories about their experiences, which were brought to the booth. In both instances, visitors were able to interact with the exhibits. In the Academy's case, what does it feel like to be blind? Or what can we do with patient stories?

**Sensory Engagement.** In course **609: *Activate Your Audience's Sixth Sense: Engagement*** I learned that sensory engagement can improve memory by 70%. I love this concept. How can we increase our sensory engagement? Ideas such as diffusing the scent of freshly-minted cash (smells like success), using lighting to define spaces, motion-activated sound, a sound "fingerprint" for the brand (like the Microsoft "ping"), touch experiences, or incorporating taste — all are inspiring me to think of ways we can make our visitors' experiences more sensorial, engaging, and memorable.

**Meaningful Giveaways.** Course **603: *Creating Global "WOW" Experiences*** also gave me some food for thought as I (and the Brand Team) encourage our staff to aim for more meaningful schwag. Giveaways should tell our story — without the logo, do people know it's from us? I liked the example of the company who laser-printed their edible logo on apples and gave them away — an apple a day, doctor's orders. Along with apple scent in the booth, it reinforced the theme while engaging visitors' senses. Also, souvenirs are tangible proof of success, but a photo-op with someone is especially memorable.

**Training Engaging Staff.** I also enjoyed visiting various booths at ExhibitorLive to get new ideas. Staff from some companies — including Derse, MG Design Associates, and Skyline Exhibits — expertly engaged me through their pitches in ways that were fun and captivating and directly related to their creative themes. It was encouraging and inspiring to see such excellent examples of proficient, enthusiastic staff.

## Strategy for Enacting Recommendations

It's entirely possible that I could come up with some inexpensive ways to bring interactive experiences, sensory engagement, meaningful giveaways, and engaging staff into our current exhibit program. It's mostly a matter of coming up with ideas that are feasible to execute in our given structure and with our current budget. A little budget flexibility is possible — for example, we probably will only bring in an outside consultant for staff training every other year — but getting more budget will be more of a challenge. I'll continue to attend ExhibitorLive for inspiration.

Back-lit graphic panels and a modular structure is not possible until 2020. The biggest hurdle will be getting Board approval for our desired budget. The new branding efforts will be in our favor. The changes I'd like to make all support our new brand guidelines, communications, and goals. That, along with a logical, well-laid-out plan based on research (again, thanks to this program), will help me sell my ideas.

## REVIEW OF LEARNING EXPERIENCES

I've thoroughly enjoyed the courses I've taken at Exhibitor*Live* and Exhibitor*FastTrak*. They've been educational, compelling, inspirational, and affirming. Most instructors have been engaging, personable, and more than willing to share their stories and expertise in the interest of cultivating our profession.

I also had a lot of fun writing this case study portfolio. Though difficult to get started, once I jumped in I found that I really enjoyed talking about what I've done and thinking of new ways that I can improve. And though I referenced 17 courses, there were so many more I would have liked to mention, as I learned something in almost every one.

Taking the courses gave me so many great ideas, and in combination with writing this portfolio, acted as a constant reminder of the possibilities of our booth and the internal promises I made to make various improvements. It kept me on my toes.

I did not sign up for the CTSM program to have letters after my name or to get a raise. Rather, I did it for the satisfaction of filling knowledge gaps, finding inspiration, and challenging myself — and this I achieved. I look forward to continuing the journey with Bronze and beyond.

# Course References

## COURSE NUMBER, TITLE

## SECTION:PAGE

1. 10516:	Using Surveys to Measure Your Performance in Trade Shows and Events (Joe Federbush) .....	5:38, 6:47
2. 10816:	How to Measure the Value of Trade Show Participation (Joe Federbush) .....	3:13, 5:28
3. 117:	You Know What to Measure – But How Do You Actually Measure It? (Joe Federbush) .....	6:46
4. 20116:	Selecting the Right Shows: The Critical Decision (Ian Sequeira) .....	2:10
5. 20215:	Basic Project Management and Reporting Skills (Jerry Gerson) .....	3:13, 4:15
6. 20416:	Don't Skip the Meetings – Pre, At and Post: Guideposts to Success (Marc Goldberg, CME) .....	4:15
7. 20615:	Show Operation Basics – Part I: Pre-show Planning (Candy Adams) .....	5:30
8. 221:	Are You Game? New Approaches to Exhibit Staff Preparation (Mim Goldberg) ..	5:37
9. 30715:	Creative Thinking to Reinvigorate Your Program (Leo Boczar & Tom Frisby) .....	7:51
10. 30815:	Business Marketing Strategies and Trade Shows (Bob Milam) .....	5:36
11. 31115:	How to Grow Your Brand: Incorporating Brand Marketing Into Your Exhibit Program (Scott Leech) .....	4:18, 5:36
12. 31515:	Integrated Marketing Communications (Katharine Chestnut Klang) .....	5:27, 5:28
13. 320:	Tate & Lyle: A Taste of Trade Show Marketing Excellence (Kelly Noonan & Anne Trompeter) .....	4:17, 6:48
14. 603:	Creating Global “WOW” Experiences (Eddie Newquist) .....	7:51
15. 609:	Activate Your Audience's Sixth Sense: Engagement (Leo Boczar & Tom Frisby) ..	7:51
16. 61715:	Graphics Boot Camp: The Basics Every Event Manager Should Know (Brian Baker) .....	4:18, 5:25
17. 72116:	Negotiating Skills to Win (G. Dan Lumpkin, CMC) .....	5:39

# Appendix

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# AAO 2016 EXHIBIT PROSPECTUS – MEETING ATTENDANCE & DEMOGRAPHICS

AAO 2016 Exhibit Prospectus

## Meeting Attendance

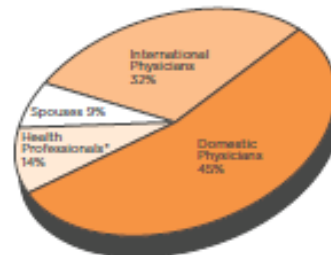
### AAO 2015 Las Vegas

Physicians	15,484
Health Professionals*	2,821
Spouses	1,801
Exhibitors	8,249
<b>Total Attendance</b>	<b>28,355</b>

Number of exhibiting companies: 585  
NSF of Exhibit Space: 238,400

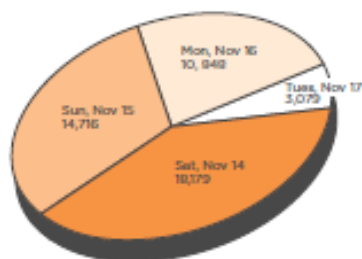
\*includes JCAHPO and ASORN registrants who purchased Academy meeting passes.

### Physicians 77%



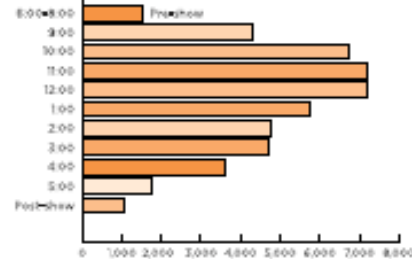
### AAO 2015 Leads by Date

Total Activity 48,739

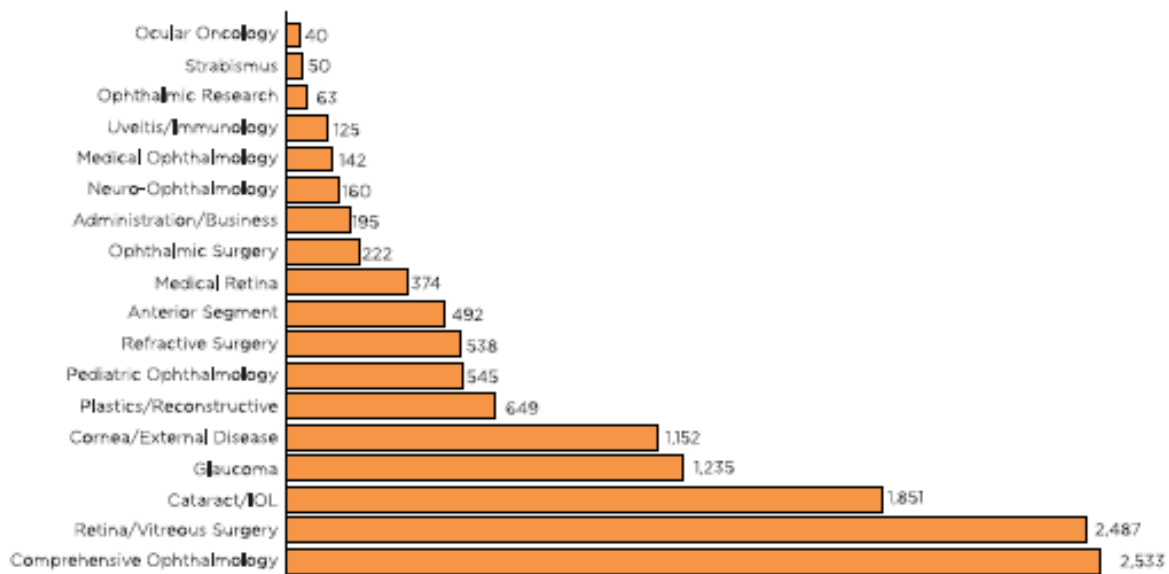


### AAO 2015 Leads by Time

Total Activity 48,739

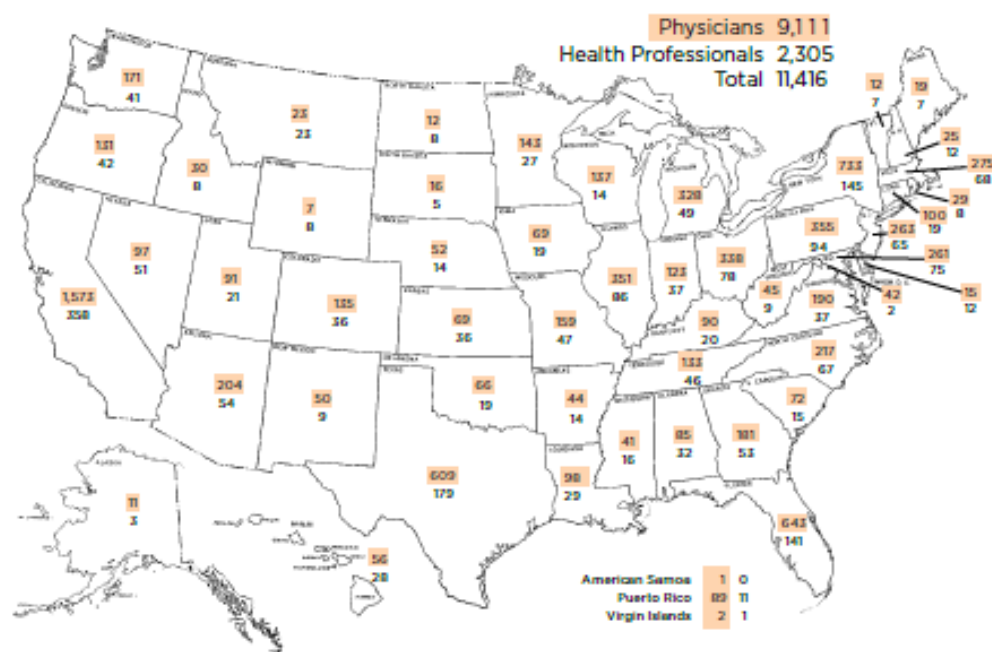


### AAO 2015 Primary Specialty Area



Data is collected during the registration process and from the Update member Profile option on the Academy's website. It is not an accurate representation of the total number of physicians who attended the meeting.

American Academy of Ophthalmology



## AAO 2015 Professional Attendees by Country

On representative from each of the following countries also attended:  
Antigua and Barbuda, Armenia, British Virgin Islands, Cambodia, Cameroon, Cayman Islands, Congo,  
Equatorial Guinea, Gabon, Guyana, Kazakhstan, Kirghizstan, Liberia, Macao, Malta, Monaco, Mongolia,  
Montenegro, Slovakia, St. Vincent and the Grenadines, Sudan, Tanzania, and Togo.

Physicians 6,373  
Allied Health 516  
Total 6,889

Country	Physician	Allied Health	Total	Country	Physician	Allied Health	Total	Country	Physician	Allied Health	Total
Afghanistan	3	0	3	Georgia	2	1	3	Norway	33	10	43
Albania	2	0	2	Germany	104	17	121	Oman	3	0	3
Algeria	32	3	35	Ghana	9	0	9	Pakistan	48	0	48
Argentina	296	13	309	Greece	54	4	58	Panama	18	2	20
Aruba	2	4	6	Guadeloupe	2	0	2	Paraguay	8	1	9
Australia	63	13	76	Guatemala	37	0	37	Peru	151	15	166
Austria	43	2	45	Haiti	2	0	2	Philippines	39	5	44
Azerbaijan	3	0	3	Honduras	11	0	11	Poland	47	0	47
Bahamas	2	0	2	Hong Kong	31	1	32	Portugal	81	1	82
Bahrain	10	0	10	Hungary	10	0	10	Qatar	14	0	14
Bangladesh	10	1	11	Iceland	6	0	6	Romania	26	1	29
Barbados	5	0	5	India	166	2	168	Russian Federation	35	7	42
Belarus	2	0	2	Indonesia	4	0	4	Saudi Arabia	97	11	108
Belgium	66	6	72	Iran	15	0	15	Serbia	12	0	12
Bermuda	1	4	5	Iraq	8	1	9	Singapore	44	9	53
Bolivia	13	3	16	Ireland	26	2	30	Slovenia	5	0	5
Brazil	772	25	797	Israel	65	11	76	South Africa	7	0	7
Bulgaria	5	0	5	Italy	342	15	357	South Korea	0	3	3
Canada	536	88	624	Jamaica	21	0	21	Spain	183	5	188
Chile	66	12	78	Japan	240	44	284	Sri Lanka	9	0	9
China	124	7	131	Jordan	32	2	34	St. Lucia	2	1	3
Colombia	114	3	117	Korea	91	6	97	Sweden	58	7	65
Costa Rica	27	1	28	Kuwait	18	0	18	Switzerland	70	6	76
Croatia	13	0	13	Latvia	6	0	6	Taiwan	59	2	61
Cuba	3	1	4	Lebanon	35	2	37	Thailand	29	0	29
Curaçao	3	0	3	Lithuania	5	0	5	Trinidad and Tobago	19	3	22
Cyprus	2	0	2	Luxembourg	10	0	10	Tunisia	11	0	11
Czech Republic	19	0	19	Malaysia	7	0	7	Turkey	195	2	197
Denmark	52	6	58	Martinique	4	0	4	Ukraine	9	0	9
Dominican Republic	42	12	54	Mexico	327	22	349	United Arab Emirates	46	5	51
Ecuador	69	10	79	Morocco	10	0	10	United Kingdom	290	15	305
Egypt	128	4	132	Nepal	14	0	14	Uruguay	33	1	34
El Salvador	13	0	13	Netherlands	89	1	90	Venezuela	33	3	36
Ethiopia	7	0	7	New Zealand	11	3	14	Vietnam	5	1	6
Finland	14	5	19	Nicaragua	2	0	2				
France	225	35	260	Nigeria	26	4	32				

## ACADEMY TRADE SHOW & MEETING SCHEDULES, 2014–2017

<b>2014</b>			
<b>Meeting</b>	<b>Location</b>	<b>Dates</b>	<b>Attendance</b>
WOC/APAO	Tokyo, Japan	April 2–5	10,000
Mid-Year Forum	Washington, DC	April 9–12	400
ASCRS	Boston	April 25–29	7,000
ASRS	San Diego	Aug. 9–13	1,000
ESCRS	London, England	Sept. 13–17	7,000
<b>AAO 2014</b>	<b>Chicago</b>	<b>Oct. 18–21</b>	<b>25,000</b>

<b>2015</b>			
<b>Meeting</b>	<b>Location</b>	<b>Dates</b>	<b>Attendance</b>
APAO	Guangzhou, China	April 1–4	5,000
Mid-Year Forum	Washington, DC	April 15–18	400
ASCRS	San Diego	April 17–21	7,000
SOE	Vienna, Austria	June 6–9	5,000
ASRS – did not exhibit	Vienna, Austria	July 11–14	1,000
PAAO	Bogota, Columbia	Aug. 4–8	4,000
ESCRS	Barcelona, Spain	Sept. 5–8	7,000
<b>AAO 2015</b>	<b>Las Vegas</b>	<b>Nov. 13–17</b>	<b>29,000</b>

<b>2016</b>			
<b>Meeting</b>	<b>Location</b>	<b>Dates</b>	<b>Attendance</b>
WOC/PAAO	Guadalajara, Mexico	Feb. 5–9	10,000
APAO	Taipei, Taiwan	Mar. 24–27	4,000
Mid-Year Forum	Washington, DC	April 13–16	425
MEACO	Manama, Bahrain	May 4–8	4,000
ASCRS	New Orleans	May 6–10	7,000
ASRS	San Francisco	Aug. 10–14	1,000
ESCRS	Copenhagen, Denmark	Sept. 10–14	7,000
<b>AAO 2016</b>	<b>Chicago</b>	<b>Oct. 14–18</b>	<b>25,000</b>

<b>2017</b>			
<b>Meeting</b>	<b>Location</b>	<b>Dates</b>	<b>Attendance</b>
APAO	Singapore	March 1–5	4,000
Mid-Year Forum	Washington, DC	April 26–29	450
ASCRS	Los Angeles	May 5–9	7,000
SOE	Barcelona, Spain	June 10–13	5,000
PAAO	Lima, Peru	August 9–12	4,000
ASRS	Boston	Aug. 12–16	1,000
ESCRS	Lisbon, Portugal	Oct. 7–11	7,000
<b>AAO 2017</b>	<b>New Orleans</b>	<b>Nov. 10–14</b>	<b>25,000</b>

## DEPARTMENTAL GOALS FOR ACADEMY RESOURCE CENTER AT AAO 2016

MEASURABLE SHOW GOALS FOR THE ACADEMY RESOURCE CENTER AT AAO 2016			
Departments (individual desks/kiosks)			
Department / Measurable Goals	Strategies	Tactics	Assessment Methods
<b>Clinical Education:</b> Raise awareness of new CE Webinars	<ul style="list-style-type: none"> <li>• Demonstrations</li> <li>• Meet the Instructors event</li> </ul>	<ul style="list-style-type: none"> <li>• Recorded webinars for demo</li> <li>• Instructors present</li> </ul>	Observe attendance
<b>CE/Publications:</b> Thank journal reviewers and introduce to new <i>O.R.</i> editor	Meet-and-Greets w/ <i>Ophthalmology</i> ® and <i>Ophthalmology</i> ® <i>Retina</i> journal editors	<ul style="list-style-type: none"> <li>• Gifts for reviewers</li> <li>• Editors present</li> </ul>	Feedback from Editor-in-Chief
<b>AAOE/Coding:</b> Increase attendees' understanding about new CPT and ICD-10 codes and PQRS and MIPS rules	Provide opportunities for Q&A with staff with specialized knowledge	<ul style="list-style-type: none"> <li>• Plenty of staff (gets very busy)</li> <li>• Guest staff who are established experts in coding</li> <li>• Handouts on key issues</li> </ul>	Supervisor feedback
<b>AAOE/Conversations With the Experts:</b> Help attendees manage their practices more effectively	Give free, 20-minute, personalized practice management consultations with PM experts	Guest staff who are established experts in practice management	Full schedule with all appointments completed
<b>Information:</b> Help attendees find what they need to have a smooth experience	Provide a "know-it-all" desk	<ul style="list-style-type: none"> <li>• Well-stocked with programs, maps, handouts, etc.</li> <li>• Well-trained staff, incl. Spanish speaker</li> </ul>	Supervisor feedback
<b>IRIS Registry:</b> Get 250 new registrations	<ul style="list-style-type: none"> <li>• Meet the Experts demo event</li> <li>• Position Registry as #1 business game-changer</li> </ul>	Staff w/ specialized knowledge, incl. tech vendor	Post-show report
<b>EyeSmart:</b> Get 25 physicians to link ES on their websites or distribute materials	Convince attendees that ES is the best alternative to "Dr. Google"	<ul style="list-style-type: none"> <li>• Easy instruction cards</li> <li>• Campaign samples</li> </ul>	Tally
<b>Member Services:</b> Take 100 AAO applications and 10 AAOE applications	Convince attendees that benefits are unique, crucial, and extremely good value	New brochures	Post-show report

(continued)

Department / Measurable Goals	Strategies	Tactics	Assessment Methods
<b>CME:</b> Help attendees easily claim CME credits; accurately answer all CME questions	Provide CME “know-it-all” and easy process	<ul style="list-style-type: none"> <li>• Easy-to-use terminals</li> <li>• Staff w/ specialized knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Staff feedback</li> <li>• Equipment problems reported immediately</li> </ul>
<b>Video Production Studio:</b> Book a full schedule	<ul style="list-style-type: none"> <li>• Boost pre-show promotion</li> <li>• Promote professional film crew</li> </ul>	Include in all IMCs	Full schedule
<b>Foundation:</b> Raise awareness with 75+ attendees; Get 3 donations	<ul style="list-style-type: none"> <li>• Donor reception</li> <li>• Communicate impact our programs have on physicians and patients</li> </ul>	<ul style="list-style-type: none"> <li>• New annual report</li> <li>• Talking piece at reception</li> </ul>	<ul style="list-style-type: none"> <li>• Each reception handout is distributed</li> <li>• Onsite counts</li> </ul>
<b>Advocacy:</b> 30+ advocates send letters to Congress; Make all visitors aware of Legislative/ Regulatory Updates; Encourage donations to OphthPAC/Surgical Scope Fund	Make members understand that their future is in their hands; participation in the legislative process is crucial	<ul style="list-style-type: none"> <li>• Educational handouts</li> <li>• Mid-year advocacy report</li> <li>• Letter-writing app</li> <li>• Staff w/ specialized knowledge</li> <li>• Gifts for donation levels</li> </ul>	Supervisor feedback
<b>Academy Store (cashiers):</b> Give customers a quick, seamless experience	Accurately process all orders within 5 minutes of receipt.	<ul style="list-style-type: none"> <li>• Well-trained staff</li> <li>• No tech problems</li> </ul>	Supervisor feedback

## AAO 2015 ACADEMY RESOURCE CENTER MARKETING PLAN

Onsite Events				
Date	Description	Est. Cost	Who	Notes
Sat - Mon, 4:30 pm	iPad Raffles: Sat-Mon. FP subscription, PE videos, or Coding Coach subscription	COGS + \$1,500k + \$800	KC/RO	Enter w/ any product demo or quality interaction with staff. Need not be present to win. \$1,500 for 3 iPads, \$800 for 4,000 raffle tickets. Ticket also on door drop brochure. Raffle box sign is free.
Sat - Tue	10% discount on all product purchases at the RC (+ MOD, Sands Lobby)		KC/RO/JWard	All product. May combine with coding 4, FP, OMA, videos 4. But not combinable with other discounts/promo codes. Not valid for dues, annual meeting, VPS, tax, shipping, etc. No minimum purchase required.
Sat - Tue	Giveaway: Academy pens	\$8,800	RO	Qty 3,500. Budget was \$4,800; OK to take \$4k from Ari that I'd given him for web hosting.
Sat - Tue	Academy totes for product pick-up	\$1,800	RO	Qty ≤700; \$1,800; on AM budget, deferred to FYE16 <i>Switch to RC budget, incl new Academy logo, no meeting year/logo, will be used for a few years. No longer deferred.</i>
Sat - Tue	Pick up new membership pins @ RC		Membership	Give to BOT/COS/past presidents in advance so others will take notice (delayed until AAO 2016)
Sat 2-3 pm	PE event - Lights! Camera! Action! Celebrate Our New PE Videos	\$4,200	KC/TE	Like movie premiere, popcorn, red vines.
Sun 1-3pm	Ophthalmology journal meet & greet	\$0	May P	Reserve 2 tables in lounge. No F&B.
Sun 3-5pm	ECA volunteer reception @ Museum	\$0	Betty	By invitation only. Drs can sign up to volunteer @fdn desk & receive invitation. (We only promote. They plan.)
Mon 9-11am	Ophthalmology journal meet & greet	\$0	May P	Reserve 2 tables in lounge. No F&B.
Mon 3:30-4:30 pm	CE event - IRIS Registry Participants Meet & Greet w/ Super-users & Member Leaders	\$3,500 but OK for \$3,800	KC/AG	FigMD staff & IRIS VIPs (Rich, Chang). F&B but downplay it. Follows IRIS session Mon/16th. Encouraging current users to meet super-users and discuss experiences.
Nov. 18 - Dec. 1	10% discount on all product purchases online, with discount code RC2015S or RC2015P	\$500	KC/RO/JWard	Cost is for 2,000 discount cards. Subscriptions and inventoried product only - separate codes must be used; cannot use two codes in one order :-)

Pre-Show Marketing				
Date	Tactic	Est. Cost	Who	Notes
all year	Meetings email blasts (NN)	free	NN	Brief mentions of RC
June-Oct.	Message in reg conf email	free	KC/ KDutrow	
June-Nov.	RC page on <a href="http://www.aao.org/2015">www.aao.org/2015</a>	free	RO/ AGreber	
July/Aug	Virtual Exhibition	free	RO	
Sept. 17	Card Pack	free	NN/RO	Qty xx,000. No bags, advance reg only.
Oct. xx	Pre-show postcard mailing dedicated to RC	\$6,000	RO	To all dom/intl AAO/AAOE preregistered non/members (abt 13,000; \$2,500 - printing; \$3,500 postage)
Sept. 22	Brochure in mailed badge packets	\$2,500	RO	Include form for raffle -- fill out, bring to RC for chance to win(??) Stress how to solve probs, not just what to do. Qty 13,000
end of Oct.; Nov. 13-17	Ad in Meeting Guide	free	RO	23,000; if space available
Nov.	2 page feature in EyeNet	free	KC	
Oct/Nov	Training #1: Basic training w/ KC	free	KC	For meeting/RC/basic product info - 2 hours; include branding
Oct/Nov	Training #2: Product/area training	free	KC/misc	For specific products/ lines from the owners, e.g., BCSC or coding or DVDs - from mktg/CE/AAOE/etc
Oct/Nov	Training #3: Advanced training w/ Jefferson Davis		KC	CANCELED FOR THIS YEAR. abt. \$5950 + travel. Mandatory for all onsite AAO RC staff (exclude store this year). Train as continuation from last 2 years but with more role-play; separate product from non-product. Shorter. (Staff: show up on time; allow 45 min travel time hotel>MCP.)
Nov. 11	Academy Express	free	RO	
Nov. 6 >>	Twitter/Facebook /LinkedIn posts	free	HM	
Nov. 6	RC Email blast	free	RO	Dedicated to RC
Nov. 11	Academy Express	free	RO	
During Show				
Date	Tactic	Cost	Who	Notes
Nov. 13-17	promo item in attendee bags (abt xx,000)			No for this year
Nov. 13-17	Ad in Final Program	free	RO	16,000; if space available
Nov. 13-17	Ad in EyeNet Exhibitor Guide	free	RO	39,000; if space available
Nov. 13	Hotel door drop brochure	\$6,600	RO	Qty 11,600. Opp is free; cost is for production (may split btwn CE, AAOE, PE, RC)

Nov. 13, 3:30 pm	Friday afternoon RC staff training walk-through	free	KC/BB	Highly recommended for anyone in Las Vegas by Friday (incl DC). Encourage volunteers/non-staff to attend.
Nov. 13-17	Session room slides	free	RO/NN	
Nov. 13-17	Floor decals - 5x5" outside hall entrance or footsteps down reg chute	\$500?	RO	Freeman - no this year
Nov. 13-17	Academy shirts	depts pay	KDutrow	Choice of shirt/cardigan. Depts pay own. Men's shirts \$30 each, women's shirts \$40, women's cardigans \$43. <a href="http://www.aao.org/meetings/annual_meeting/shirts.cfm">www.aao.org/meetings/annual_meeting/shirts.cfm</a> All new shirts this year. Gray and purple options. In future, staff encouraged to reuse, but ok to get new ones in case of damage, changed size, etc.
Nov. 13-17	Screensaver		NN/RO	Probably - only at Rest Stop, no lobby this year
Nov. 14-17	Small "reserved" signs for OJ event, VPS waiting tables, coding tables		RO	6 signs (2 each), acrylic stands
Nov. 14-17	Small discount signs for order form counter		RO	4 signs, acrylic stands
Nov. 14-17	Easily accessible order forms		Woody	Discount call-out on front
Nov. 14-17	Discount signs for order form holders		RO	Abt 16, laminated, velcro
Nov. 14-17	?? Laminated flyers/"spotlights" for select monitors	free		Not this year
Nov. 14-17	Tweets & FB posts re: discount, raffle, etc.	free	MS	
Nov. 14-17	Prime location (near near LL and IHE)	free	AZammaro	Booth #2632. Near <del>LL, IHE,</del> MOV, OMIC??
<b>Total cost:</b>		<b>\$29,800</b>	(from RC budget)	

## AAO 2016 ACADEMY RESOURCE CENTER MARKETING PLAN

In-Booth Events/Promotions					
Due Date	Drop/Live Date	Description	Est. Cost	Who	Notes
-	<del>Sat - Mon,</del> 4:30 pm	iPad Raffles: <del>Sat - Mon. FP subscription, PE videos, or Coding Coach subscription</del> <b>CANCELED</b>	<del>COGS + \$1,500k + \$800</del>	KC/RT	<del>Enter w/ any product demo or quality interaction with staff. Need not be present to win. \$1,500 for 3 iPads, \$800 for 4,000 raffle tickets. Ticket also on door drop brochure. Raffle box sign is free.</del>
	Sat - Tue	10% discount on all product purchases at the RC (+ MOD Grand Concourse)		KC/RT/JWard	All product. May combine with coding 4, FP, OMA, videos 4. But not combinable with other discounts/promo codes. Not valid for dues, annual meeting, VPS, tax, shipping, etc. No minimum purchase required.
28-Sep	Sat - Tue	Giveaway: Academy pens	\$6,646	RT	Qty 3,500.
28-Sep	Sat - Tue	Academy totes for product pick-up		RT	Qty ≤700; \$1,800
	Sat - Tue	Pick up new <del>membership</del> achievement pins @ RC Pick up anniversary certificates @ RC		Members hip	
	Sat - Tue	Rotating videos on New From the Academy monitor			Brand, MYF 2017, patient stories, eye exam motion graphic
18-Jul	Sat 2-3 pm probably - need to confirm w Flora	CE event - IRIS Registry Participants Meet & Greet w/ Super-users & Member Leaders		KC/AG/RJ	FigMD staff & IRIS VIPs (Rich, Chang). F&B but downplay it. Follows IRIS session Mon/16th. Encouraging current users to meet super-users and discuss experiences.
18-Jul	Sat 4-5 pm	<b>NEW:</b> Foundation donor appreciation reception		TL/KD	
	Sun 1-3pm	Ophthalmology journal meet & greet	\$0	May P	Reserve 2 tables in lounge. No F&B.
	Sun 3-5pm	ECA volunteer reception @ Museum	\$0	Betty	By invitation only. Drs can sign up to volunteer @fdn desk & receive invitation. (We only promote. They plan.) Special recognition gift. Bring a colleague who's interested.
	Mon 9-11am	Ophthalmology journal meet & greet	\$0	May P	Reserve 2 tables in lounge. No F&B.
18-Jul	Mon 10-11 am	CE Webinars Meet & Greet			

21-Sep	19-Oct > 02-Nov	10% discount on all product purchases online, with discount code RC2016S or RC2016P	\$500	KC/RT/JW ard	Cost is for 2,000 discount cards. Subscriptions and inventoried product only - <b>separate codes must be used; cannot use two codes in one order :-{</b>
<b>Pre-show Promotion</b>					
<b>Due Date</b>	<b>Drop/Live Date</b>	<b>Tactic</b>	<b>Est. Cost</b>	<b>Who</b>	<b>Notes</b>
	all year	Meetings email blasts (NN)	free	NN	Brief mentions of RC
	June-Oct	Message in reg conf email	free	KC/Dutrow	
24-Jun	July-Oct	Virtual Exhibition	free	RT	
01-Aug	Aug-Oct	RC page on <a href="http://www.aao.org/2016">www.aao.org/2016</a>	free	RT/Abby	
30-Jul	Sep/Oct	<b>NEW:</b> RC page in brochure in mailed badge packets (MG w ad no longer mailed)	\$2,700	RT	Stress how to solve probs, not just what to do. Qty 12,500. 5.5"x8.5. Arrive Experient by 8/19.
28-Jul	09-Sep	2-pg spread in catalog	\$2,000	RT	
22-Aug	16-Sep	Card Pack	free	NN/RT	Qty xx,000. No bags, advance reg only.
	28-Sep	Academy Express	free	RT	Dedicated to RC
	28-Sep	<b>NEW:</b> Practice Management Express	free	RT	Dedicated to RC
05-Sep	01-Oct	Pre-show postcard mailing dedicated to RC	\$8,600	RT	To all dom/intl AAO/AAOE preregistered non/members; double, to make up for lost space in badge mailing?
	01-Oct >>	Twitter/Facebook/LinkedIn posts	free	MS	Dedicated to RC
	05-Oct	Academy Express	free	RT	Dedicated to RC
	07-Oct	RC Email blast	free	RT	Dedicated to RC; make discount part look like coupon
01-Oct	07-Oct >>	AAO.org spotlights	free	RT	
<b>Onsite Promotion</b>					
<b>Due Date</b>	<b>Drop/Live Date</b>	<b>Tactic</b>	<b>Cost</b>	<b>Who</b>	<b>Notes</b>
-	<del>Nov. 13-17</del>	<del>Ad in Final Program</del> <b>Program Discontinued</b>	free	RT	16,000; if space available
09-Sep	Oct	Ad in EyeNet	\$300	RT	
14-Sep	14-Oct	Hotel door drop brochure	\$6,600	RT	Qty 11,600. Opp is free; cost is for production (split btwn CE, AAOE, PE, RC)
01-Jul	Fri - Sat	Ad in SubDay Syllabi	free	RT	-
22-Aug	Fri - Tue	Ad in Meeting Guide	free	RT	23,000; if space available (due Aug 22)
	Fri - Tue	Session room slides	free	RT/NN	
	Fri - Tue	Tweets & FB posts re: discount, raffle, etc.	free	MS	

18-Jul	Fri - Tue	<b>NEW:</b> Meter panels in Grand Concourse		RT	RC ads
	Fri - Tue	Mobile Meeting Guide	free	RT/NN	& "happening now"
	Fri - Tue	<b>NEW:</b> Catalogs @ Mtg Info	free	RT	
18-Jul	Sat - Mon	Meter panels in RC		KC	promote daily events
15-Jul	Sat - Tue	Ad in EyeNet Exhibitor Guide	free	RT	39,000; if space available
15-Jul	Sat - Tue	1 page feature in EyeNet Academy News	free	KC	
		blurb in EyeNet Academy Live??			
20-Sep	Sat - Tue	Screensaver	free	NN/RT	Probably - only at Rest Stop, <b>no lobby this year</b>
	Sat - Tue	NEW: signs in lounges? - no, do postcard or flyer instead		RT	AAOE, YO, SO, Intl
<b>Other Marketing (Non-promotional)</b>					
<b>Due Date</b>	<b>Drop/Live Date</b>	<b>Tactic</b>	<b>Cost</b>	<b>Who</b>	<b>Notes</b>
	Sep/Oct	Training #1: Basic training w/ KC	free	KC	For meeting/RC/basic product info - 2 hours; include branding
	Sep/Oct	Training #2: Product/area training	free	KC/misc	For specific products/ lines from the owners, e.g., BCSC or coding or DVDs - from mktg/CE/AAOE/etc
	Sep/Oct	<b>NEW</b> Training #3: Advanced training w/ ???		KC	abt. \$5950 + travel. Mandatory for all onsite AAO RC staff (exclude store this year). Train as continuation from last 2 years but with more role-play; separate product from non-product. Shorter. (Staff: show up on time; allow 45 min travel time hotel>MCP.)
	Fri, 3:30 pm	Training #4: RC staff walk-through	free	KC/BB	Highly recommended for anyone in Chicago by Friday (incl DC). Encourage volunteers/non-staff to attend.
	Sat - Tue	Prime location (near near LL and IHE)	free	Anna	Booth #508. Near LL, IHE, MOV, OMIC
	Sat - Tue	Academy shirts	depts pay	Dutrow	Choice of purple shirt/cardigan. Depts pay own. Men's shirts \$30 each, women's shirts \$40, women's cardigans \$43. <a href="http://www.aao.org/meetings/annual_meeting/shirts.cfm">www.aao.org/meetings/annual_meeting/shirts.cfm</a>

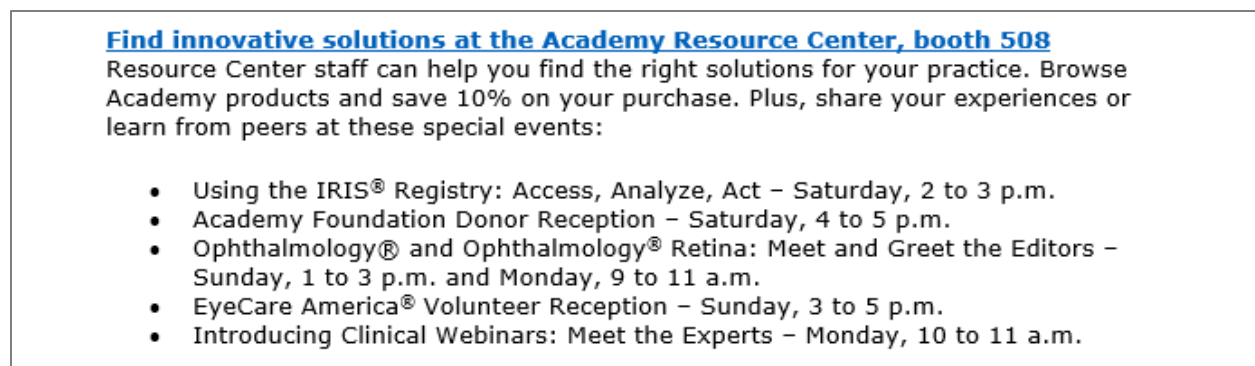
21-Sep	Sat - Tue	Small "reserved" signs for OJ event, VPS waiting tables, coding tables		RT	6 signs (2 each), acrylic stands
21-Sep	Sat - Tue	Small discount signs for order form counter		RT	4 signs, acrylic stands
	Sat - Tue	Product order forms		Woody	Discount call-out on front, acrylic pockets
21-Sep	Sat - Tue	Discount signs for order form holders		RT	Abt 16, laminated, velcro
	Sat - Tue	Laminated flyers/"spotlights" for select monitors	free	MKTG	what's on this monitor
		Resource Router handouts			
sep	Sun - Mon	B-roll shoot to promote AAO 2017	free (comes out of AM budget)	RT/KC	
03-Aug	Sun - Mon	photo shoot to promote AAO 2017	free	RT/KC	
<b>Total cost:</b>			<b>\$25,046</b>	(from RC budget)	

## IMC SAMPLES AND PHOTOS – PRE, ONSITE, AND POST

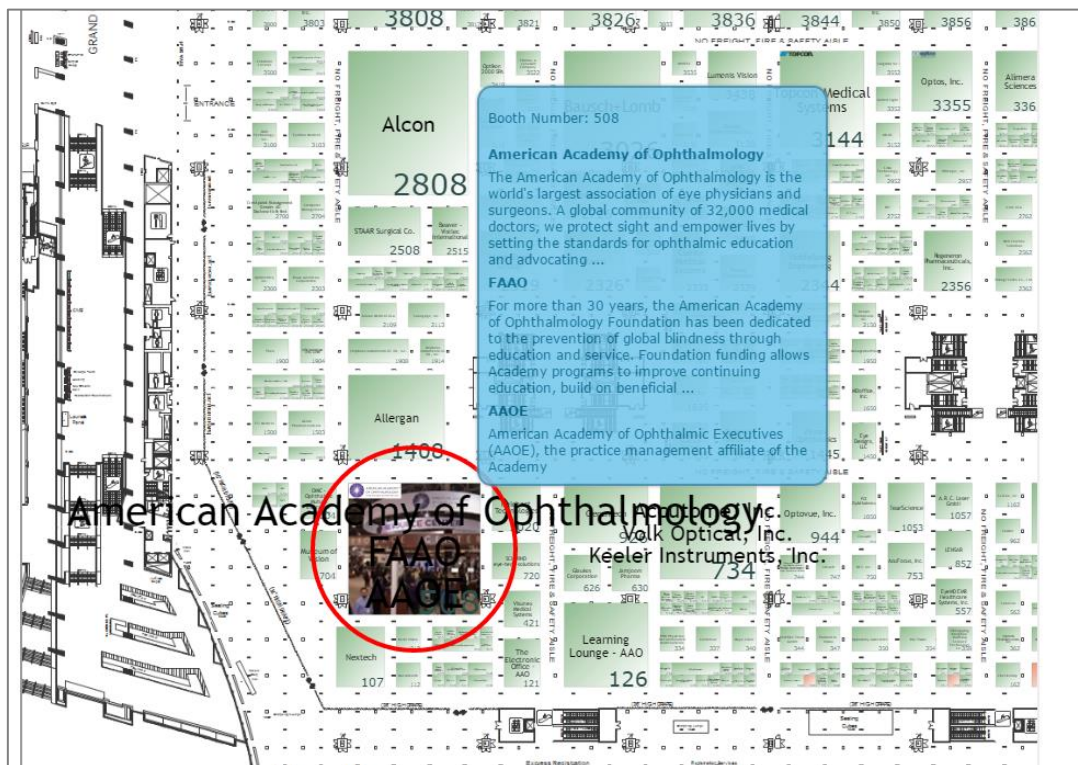
**Pre-Show Email Blast** (partial) – sent to all preregistered attendees



**Blurb in Academy Express, Oct. 5** – emailed to all Academy members + about 10,000 nonmembers



Listing in Virtual Exhibition – <http://www.aao.org/annual-meeting/virtual-exhibition>



## 2-Page Spread in Fall 2016 Product & Resource Catalog

**AMERICAN ACADEMY™ OF OPHTHALMOLOGY**

**Find Innovative Solutions for Your Practice at the Academy Resource Center**

**Booth 508**



**Save 10% on products at the Academy Resource Center**

**ENHANCE QUALITY OF CARE WITH ACADEMY PRODUCTS**

During AAO 2016, the Academy's entire collection of innovative clinical education, patient education and practice management products are on display at the Academy Resource Center.

Academy products are developed to help you build a solid clinical foundation, enhance your patients' understanding of complicated medical information and run a profitable and efficient practice.

Save 10% on all Academy products at the Resource Center.

**ATTEND SPECIAL EVENTS**

**Using the IRIS® Registry: Access, Analyze, Act**

Saturday, Oct. 15, 2 - 3 p.m.

Uncover clinical insights into your patient population.

**Academy Foundation Donor Reception**

Saturday, Oct. 15, 4 - 5 p.m.

The Academy Foundation invites its donors to meet Academy leaders and enjoy refreshments.

**Ophthalmology® and Ophthalmology® Retina: Meet and Greet the Editors**

Sunday, Oct. 16, 1 - 3 p.m.

Monday, Oct. 17, 9 - 11 a.m.

Authors and peer reviewers: Stop by and meet the editorial board.

**EyeCare America® Volunteer Reception**

Museum of Vision, Booth 704 (next to the Resource Center)

Sunday, Oct. 16, 3 - 5 p.m.

Join your EyeCare America volunteer colleagues to honor your dedication to this program.

**Introducing Clinical Webinars: Meet the Experts**

Monday, Oct. 17, 10 - 11 a.m.

Meet the member volunteers creating the Academy's new clinical webinar series.

**Protecting Sight. Empowering Lives.™**

**PURCHASE THE LATEST PRODUCTS**

**CLINICAL EDUCATION**

- 2016-2017 Basic and Clinical Science Course (BCSC) – see page 8 - 11
- Focal Points 2017 – see page 6 - 7
- NEW EDITION: Basic Ophthalmology, 10th ed. – see page 13
- NEW EDITION: Practicing Ophthalmologists Learning System, 2017-2018 – see page 15
- New Clinical Webinar Series – see page 16

**PATIENT EDUCATION**

- 20 new topics added to the Downloadable Patient Education Handout Subscription – see page 24

**AAOE: PRACTICE MANAGEMENT**

- 2017 Coding Coach: Complete Ophthalmic Coding Reference (print and online) – see page 31
- 2017 Retina Coding: Complete Reference Guide – see page 31
- 2016 ICD-10-CM for Ophthalmology: The Complete Reference (print and online) – see page 31
- 2017 CPT® Complete Pocket Ophthalmic Reference – see page 32
- 2017 CPT® Professional Edition – see page 32
- 2017 HCPCS Level II Professional Edition – see page 32
- 2017 Ophthalmic Coding: Learn to Code the Essentials – see page 33
- 2016 Ophthalmic Coding: Learn to Code the Subspecialties – see page 33

**TAKE ADVANTAGE OF EXCLUSIVE ACADEMY SERVICES**

- Explore the Academy's innovative online resources such as the Ophthalmic News and Education (ONE) Network, IRIS® Registry (Intelligent Research in Sight), EyeWise®, EyeSmart® and Academy Forum – all complimentary with your membership.
- Get expert practice management and coding advice.
- Talk to experts about MACRA and MIPS.
- Personalize the Academy's patient education videos in the Video Production Studio.
- Find out about giving opportunities available through the American Academy of Ophthalmology Foundation.
- Become an Academy member or pay dues.
- Report CME credits.




## Coordinated In-Booth Signs for Acrylic Pockets and L-Stands



Cover of Hotel Door Drop Brochure – Distributed to 11,600 rooms on Saturday night.




## Computer Screensaver – rotated on all screens throughout McCormick Place



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Find Innovative  
Solutions for  
Your Practice at  
the Academy  
Resource Center  
**Booth 508**



**Share Your Experiences and Learn From Peers at  
These Resource Center Special Events:**

**Using the IRIS Registry: Access, Analyze, Act**  
Saturday, 2 – 3 p.m.


**Academy Foundation Donor Reception**  
Saturday, 4 – 5 p.m.

**EyeCare America Volunteer Reception**  
Sunday, 3 – 5 p.m.

**Introducing Clinical Webinars: Meet the Experts**  
Monday, 10 – 11 a.m.

Save 10%  
on products  
no minimum  
purchase required.

**Post-Show Discount Card** – Given to Resource Center visitors who could not make a purchase during AAO 2016. This gave them the opportunity to get the 10% discount for two weeks after the meeting, and gives us a way to get credit for sales that were “convinced” at the meeting.




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OF OPHTHALMOLOGY  
Protecting Sight. Empowering Lives.™

If you can't make all your purchases now, we're giving you a second chance. Use one of these promo codes in our online store – no minimum purchase required – through Nov. 2 and we'll give you the same 10% off.\*

**RC2016S**  
Use this code to purchase subscription products  
*Focal Points™, Downloadable Patient Education Handouts, Downloadable Patient Education Animation Collection, Coding Coach: Complete Ophthalmic Online Reference and ICD-10-CM for Ophthalmology: The Complete Online Reference*

**RC2016X**  
Use this code for products not listed above.

Save 10% on  
all purchases  
in online store  
until Nov. 2.



AMERICAN ACADEMY™  
OF OPHTHALMOLOGY  
Protecting Sight. Empowering Lives.™

\*Please note, these codes may not be combined. However, you may place two separate orders if you are ordering both subscription and non-subscription products. Applies only to product purchases in the Academy's online store, [aao.org/store](http://aao.org/store) until 11:59 p.m. Pacific Time, Nov. 2, 2016. Does not apply to tax or shipping fees. Applies to product and subscriptions only; does not apply to dues, annual meeting, or other miscellaneous fees. May not be combined with other discounts.

[aao.org/store](http://aao.org/store)

**Photos of the In-Booth IRIS Registry Event – Speakers, demos, F&B**



## RESULTS AND RECOMMENDATIONS FOR INDIVIDUAL DEPARTMENTS AT ACADEMY RESOURCE CENTER AT AAO 2016

RESULTS AND RECOMMENDATIONS FOR THE ACADEMY RESOURCE CENTER AT AAO 2016					
Departments (individual desks/kiosks)					
Department / Measurable Goals	Strategies	Tactics	Assessment Methods	Results	Recommendations
<b>Clinical Education:</b> Raise awareness of new CE Webinars	<ul style="list-style-type: none"> <li>• Demonstrations</li> <li>• Meet the Instructors event</li> </ul>	<ul style="list-style-type: none"> <li>• Recorded webinars for demo</li> <li>• Instructors present</li> </ul>	Observe attendance	Only sold 1 webinar but also got a volunteer to teach one.	Marketing throughout the year (it's a new product); tie in a talk at the event
<b>CE/Publications:</b> Thank journal reviewers and introduce to new <i>O.R.</i> editor	Meet-and-Greets w/ <i>Ophthalmology</i> ® and <i>Ophthalmology</i> ® <i>Retina</i> journal editors	<ul style="list-style-type: none"> <li>• Gifts for reviewers</li> <li>• Editors present</li> </ul>	Feedback from Editor-in-Chief	Good attendance, editors were satisfied.	Stay the course
<b>AAOE/Coding:</b> Increase attendees' understanding about new CPT and ICD-10 codes and PQRS and MIPS rules	Provide opportunities for Q&A with staff with specialized knowledge	<ul style="list-style-type: none"> <li>• Plenty of staff</li> <li>• Guest staff who are established experts in coding</li> <li>• Handouts on key issues</li> </ul>	Supervisor feedback	As usual, area was very busy, but use was made of the additional tables and people were greeted	Keep level of staffing, continue to be sure to greet waiting attendees in a timely fashion
<b>AAOE/Conversations With the Experts:</b> Help visitors manage their practices more effectively	Give free, 20-minute, personalized practice mgmt consultations with PM experts	Guest staff who are established experts in practice management	Full schedule with all appointments completed	Full schedule	Appointments completed as scheduled.
<b>Information:</b> Help attendees find what they need to have a smooth experience	Provide a "know-it-all" desk	<ul style="list-style-type: none"> <li>• Well-stocked with maps, programs, handouts</li> <li>• Well-trained staff, incl. Spanish speaker</li> </ul>	Supervisor feedback	Staff were well-informed	Keep level of staffing, keep translator, keep attending Overview training

(continued)

Department / Measurable Goals	Strategies	Tactics	Assessment Methods	Results	Recommendations
<b>IRIS Registry:</b> Get 250 new registrations	<ul style="list-style-type: none"> <li>Meet the Experts demo event</li> <li>Position Registry as #1 business game-changer</li> </ul>	Staff w/ specialized knowledge, incl. tech vendor	Post-show report	Only got about 80, but it was a lofty goal; most members are already participating	Continue registry and reporting features throughout the year
<b>EyeSmart:</b> Get 25 physicians to link ES on their websites or distribute materials	Convince attendees that ES is the best alternative to “Dr. Google”	<ul style="list-style-type: none"> <li>Easy instruction cards</li> <li>Campaign samples</li> </ul>	Tally	Staff did not keep records but they said they gave a lot of instructions	Stay the course
<b>Member Services:</b> Take 100 AAO applications and 10 AAOE applications	Convince attendees that benefits are unique, crucial, and extremely good value	New brochures	Post-show report	Staff did not specify how many apps they got but said they made their goal	Continue marketing benefits throughout the year
<b>CME:</b> Help attendees easily claim CME credits; accurately answer all CME questions	Provide CME “know-it-all” and easy process	<ul style="list-style-type: none"> <li>Easy-to-use terminals</li> <li>Staff w/ specialized knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Staff feedback</li> <li>Equipment problems reported immediately</li> </ul>	No problems this year except slow internet; went smoothly	Stay the course
<b>Video Production Studio:</b> Book a full schedule	<ul style="list-style-type: none"> <li>Boost pre-show promotion</li> <li>Promote professional film crew</li> </ul>	Include in all IMCs	Full schedule	Schedule was fairly full	Need better promotion, more marketing, more coord w/ mktg dept
<b>Foundation:</b> Raise awareness with 75+ attendees; Get 3 donations	<ul style="list-style-type: none"> <li>Donor reception</li> <li>Communicate impact our programs have on physicians and patients</li> </ul>	<ul style="list-style-type: none"> <li>New annual report</li> <li>Talking piece at reception</li> </ul>	<ul style="list-style-type: none"> <li>Each reception handout is distributed</li> <li>Onsite counts</li> </ul>	75+ attendees, including a lot of big names. No donations.	Make stronger efforts to engage attendees who have not donated.

(continued)

Department / Measurable Goals	Strategies	Tactics	Assessment Methods	Results	Recommendations
<b>Advocacy:</b> 30+ advocates send letters to Congress; Make all visitors aware of Legislative/Regulatory Updates; Encourage donations to OphthPAC/Surgical Scope Fund	Make members understand that their future is in their hands; participation in the legislative process is crucial	<ul style="list-style-type: none"> <li>• Educational handouts</li> <li>• Mid-year advocacy report</li> <li>• Letter-writing app</li> <li>• Staff w/ specialized knowledge</li> <li>• Gifts for donation levels</li> </ul>	Supervisor feedback	Staff did not keep track of letters but they were very busy the whole time	Continue updates & education about new regulations
<b>Academy Store (cashiers):</b> Give customers a quick, seamless experience	Accurately process all orders within 5 minutes of receipt.	<ul style="list-style-type: none"> <li>• Well-trained staff</li> <li>• No tech problems</li> </ul>	Supervisor feedback	Most went smoothly. There was a glitch with the computer not sending license keys. It wasn't the store's fault but still reflects on the user's experience.	Continue with staff levels and training. Make sure IT has products and notifications set up properly.

## POST-SHOW SALES REPORTS

### Resource Center Sales and Goals, 2009–2016

(As of 10/26; one-week results)

Resource Center Sales Goals							
	TOTAL (\$)	GOAL	% of Goal	Over/ Under Goal	Profes- sional Attendees	\$ Per Attendee	% Change vs Prior Year
2009 San Francisco	\$ 534,483				16,723	\$ 31.96	
2010 Chicago	\$ 470,978				15,929	\$ 29.57	-7%
2011 Orlando	\$ 426,882	\$ 462,000	92%	\$ (35,118)	16,140	\$ 26.45	-11%
2012 Chicago	\$ 361,684	\$ 479,630	75%	\$ (117,946)	15,826	\$ 22.85	-14%
2013 New Orleans	\$ 436,837	\$ 408,000	107%	\$ 28,837	15,383	\$ 28.40	24%
2014 Chicago	\$ 448,503	\$ 480,521	93%	\$ (32,018)	15,881	\$ 28.24	-1%
2015 Las Vegas	\$ 483,198	\$ 470,928	103%	\$ 12,270	18,305	\$ 26.40	-7%
2016 Chicago	\$ 475,234	\$ 375,000	126%	\$ 98,597	15,854	\$ 23.76	-10%

(Sales details on next page.)

# Resource Center Sales Details, 2009–2016

(As of 10/26; one-week results)

Resource Center Sales (# of sales, \$\$ - RC Store Only )												
	Saturday	Saturday	Sunday	Sunday	Monday	Monday	Tuesday	Tuesday	TOTAL (# of sales)	TOTAL (\$)	variance, previous yr	Notes
2009 San Francisco	324	\$ 101,617	440	\$ 134,272	484	\$ 169,538	367	\$ 129,055	1,616	\$ 534,483		
2010 Chicago	315	\$ 78,867	388	\$ 114,798	525	\$ 180,067	279	\$ 96,901	1,509	\$ 470,978	-12%	
2011 Orlando	242	\$ 81,961	343	\$ 108,136	441	\$ 154,150	256	\$ 82,635	1,282	\$ 426,882	-9%	
2012 Chicago	246	\$ 78,511	320	\$ 102,693	330	\$ 113,059	208	\$ 67,422	1,104	\$ 361,684	-15%	
2013 New Orleans	293	\$ 95,907	322	\$ 113,842	391	\$ 135,715	178	\$ 67,887	1,195	\$ 416,785	15%	ICD-10 product
2014 Chicago	254	\$ 85,510	288	\$ 108,701	322	\$ 109,363	132	\$ 54,608	996	\$ 358,182	-14%	
2015 Las Vegas	318	\$ 111,943	358	\$ 136,682	402	\$ 149,391	173	\$ 66,603	1,251	\$ 464,619	30%	
2016 Chicago	297	\$ 110,942	348	\$ 138,534	366	\$ 151,200	157	\$ 62,055	1,168	\$ 462,731	0%	
Resource Center Sales (# of sales, \$\$ - RC Store + Promo Codes + Other )												
	RC Sales Total	RC Sales Total	Post-Mtg Promo Code	Post-Mtg Promo Code	Other	Other	TOTAL (# of sales)	TOTAL (\$)	variance, previous yr	In-Booth Promotions		
2009 San Francisco	1,616	\$ 534,483	n/a	n/a	n/a	n/a	1616	\$ 534,483		10% off w/ purchase of \$250		
2010 Chicago	1,509	\$ 470,978	n/a	n/a	n/a	n/a	1509	\$ 470,978	-12%	10% off w/ purchase of \$250		
2011 Orlando	1,282	\$ 426,882	n/a	n/a	n/a	n/a	1282	\$ 426,882	-9%	10% off (no minimum)		
2012 Chicago	1,104	\$ 361,684	n/a	n/a	n/a	n/a	1104	\$ 361,684	-15%	free shipping, iPad raffles, Verghese event, + email blast & postcard		
2013 New Orleans	1,195	\$ 416,785	39	\$ 20,052	n/a	n/a	1234	\$ 436,837	21%	10% off, discount cards, iPad raffles, IRIS event, ONE event, match catalog/mktg		
2014 Chicago	996	\$ 358,182	63	\$ 30,321	\$ 60,000		1059	\$ 448,503	3%	10% off, discount cards, iPad raffles, IRIS event, PE event		
2015 Las Vegas	1,251	\$ 464,619	44	\$ 18,579	n/a	n/a	1295	\$ 483,198	8%	10% off, discount cards, iPad raffles, IRIS event, PE event, + RC spread in catalog		
2016 Chicago	1,168	\$ 462,731	29	\$ 12,503	n/a	n/a	1197	\$ 475,234	-2%	10% off, discount cards, IRIS event, CE Webinars event, FAAO event		

## POST-SHOW PURCHASERS SURVEY

The Academy used to conduct a survey for all annual meeting attendees, in which Resource Center questions were included. Since the feedback was highly consistent from year to year and our attendees were getting survey fatigue, in 2015 we shortened the survey to a brief version which does not include Resource Center questions. This left me with no way to track customer satisfaction, which is one of our two marketing goals. As a result, in 2015 and 2016 I conducted my own survey, using the same questions so as to keep a consistent baseline.

Following are the stats for my AAO 2015 and AAO 2016 post-show surveys:

Survey Email Blast Stats				
Starting 2015				
	2015 Las Vegas		2016 Chicago	
Total Recipients	1125		1061	
Success	1107		1055	
Opens	1,050	95%	1,140	108%
Unique Opens	605	55%	554	53%
Clickthroughs	123	11%	164	16%
Unique Clickthroughs to Survey Link	105	9%	46	4%
Surveys Completed	99	9%	44	4%

*\*As of Oct. 25 (one week's results)*

As in 2015, most of the **negative comments** related to people not receiving online product license keys.

**Positive comments** included:

- Academy staff are always very helpful
- All academy staffs worked very hard and try to help members. I thank them very much.
- Quick service and very professional
- The resource center was my lifeline to sanity in this world of CMS overregulation. The staff was kind, knowledgeable, and very helpful. Thank-you very much and much kudos to your excellent resource.
- You look royal in your blue [purple] dresses!
- Professional, attentive, knowledgeable

*(Survey detail on next page.)*

(As of 10/26; one-week results)

[illegible]

I don't have records of how many staff attended the **In-Depth Product Training** sessions in 2015, but I know that only one or two people opted to cross-train outside their areas. This year, **14 people attended** training for secondary areas of responsibility. The new **flash cards** also provided cross-training opportunities that I don't track.

Below is my **Resource Center staff training survey request**, in which I also shared results and expressed gratitude and appreciation for a job well done:

## Resource Center Staff Training Survey Results

Following are the results of my staff training surveys since I took this job in 2011 *(as of Oct. 26; one week's results)*.

Staff Training Survey Results - 2011 to Present													
		2011		2012		2013		2014		2015		2016*	
Respondents		37		40		27		39		38		23	
Overview: Level of Info	Too much	1	3%	3	8%	2	7%	2	5%	4	11%	1	6%
	Just right	23	77%	26	72%	22	81%	33	85%	28	78%	15	88%
	Not enough	6	20%	7	19%	3	11%	3	8%	4	11%	1	6%
Overview: Helpful	Excellent	8	27%	6	13%	5	19%	10	26%	7	19%	7	41%
	Very good									11	31%	6	35%
	Good	19	63%	17	37%	19	70%	20	51%	12	33%	3	18%
	OK	3	10%	11	24%	3	11%	6	15%	5	14%	1	6%
	Poor	0	0%	2	4%	0	0%	2	5%	1	3%	0	0%
Product: Level of Info	Too much			1	7%	0	0%			1	5%	0	0%
	Just right			13	87%	9	35%			14	74%	8	100%
	Not enough			1	7%	1	4%			4	21%	0	0%
Product: Helpful	Excellent			7	41%	1	4%			2	11%	4	50%
	Very good									9	47%	3	38%
	Good			9	53%	8	31%			5	26%	1	13%
	OK			1	6%	0	0%			2	11%	0	0%
	Poor			0	0%	1	4%			1	5%	0	0%
Skills - Adjectives	Positive / Too much			46	63%	43	77%	42	72%			2	12%
	Neutral / Just right			14	19%	7	13%	4	7%			14	82%
	Negative / Not enough			13	18%	6	11%	12	21%			1	6%
Skills - Helpful	Excellent			9	28%	6	23%	5	13%			2	12%
	Very good											3	18%
	Good			11	34%	10	39%	11	28%			8	47%
	OK			8	25%	5	19%	8	21%			2	12%
	Poor			4	13%	2	8%	3	8%			2	12%
Walk-Through - Level of Info	Too much			1	5%	0	0%	0	0%	1	5%	0	0%
	Just right			16	73%	12	46%	16	41%	16	76%	7	100%
	Not enough			5	23%	3	12%	3	8%	4	19%	0	0%
Walk-Through - Helpful	Excellent			5	23%	3	12%	5	13%	5	24%	4	57%
	Very good									8	38%	2	29%
	Good			4	18%	5	19%	6	15%	4	19%	0	0%
	OK			9	41%	6	23%	6	15%	4	19%	0	0%
	Poor			4	18%	1	4%	2	5%	0	0%	1	14%
*Results through 10/26 (one week)													