Client briefing doc (New enquiry)

M&G

Note to user: please do not leave and fields blank. If not needed write NA, if needed but not known write TBC.

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| Questions | Notes |
| How did you hear about us? / What do you know about Broadsword? | NA |
| Company profile | NA |
| Main contacts for brief and department – contact information | Fiona McNish –Head of Global Events  Georgia Thomas – UK EM  Becci Henderson – Global EM  Alice Mastroianni – Events Assistant |
| Tell us more about your project – why does it exist and why is it important? | See slide 2 in Key Information PPT |
| How do you want the audience to experience the event?  What take away do you want your delegates to have? | See slide 2 in Key Information PPT |
| What are the key themes/objectives? | See slide 2 in Key Information PPT |
| How are you measuring the success of the event? | See slide 2 in Key Information PPT |
| Is there any existing creative? | No, see more details further down |
| Will you require our help with the programme / content? | No |
| Do you have any in-house creative resource? | Yes – all creative will need to be approved by the brand team. The brand team may decide to do elements for the event. |
| How important is it to measure the carbon impact of the event? | Need to work with a lady called Mara  Look at Event Cycle – would like to evidence we are trying to do something afterwards |
| What are the post event needs? | TBC – most likely the below:   * Highlights video * Top and tailed session videos * Vox pop interviews filmed during the event |
| What is the budget? | Same as 2023 |
| Next steps? | Set up weekly catch ups – done  Share proposal  Book site visit at The Londoner for John and Charlotte |
| Timeline to get everything signed off? | TBC – M&G’s ideal timeline in Key Information PPT slide 6 |

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| **Key details:** |  |
| Title | Annual Investment Forum |
| Date | 30th Jan – UK day  31st Jan – Global day |
| Format – in-person / hybrid / virtual | In person only |
| Agenda – any details on timings/schedule useful | Monday 29th – install from 8am  See Key Information PPT deck slide 4 for full Tuesday and Wednesday agendas |
| Location(s) – venue / speakers - city / country | The Londoner – speakers and delegates |
| Audience numbers | UK day – 180 inc staff  Global day – 160 inc staff |
| Audience demographic | UK day - UK Investment professionals, predominately existing clients; aiming for 80% of the delegates to be gatekeepers  Global day - Investment professionals from across the globe (Europe, LATAM & Asia); Asset allocators, Heads of fund selectors, product and investment heads - large advisors and senior bankers. |
| Is this a repeat event for the client? If yes when and where? | Yes  Last year in person at the Pan Pacific, before Covid held at their offices and The Langham |
| Is this a repeat event for Broadsword? If yes when? | Yes  2023 / 22 / 20 / 19 |
| Client time-zone | GMT |
| Is a venue search needed? NB please complete the below Venue search section | No |
| Is the event internal, external or both? | External |
| Are there any other suppliers involved? | Brand agency called Gravity Global are working on the M&G re-brand. The logo will be staying the same. They are looking at messaging, narrative, look and feel, creative for the business as a whole.  This event will be a bit of a launch.  Invites and save the dates will be very plain as won’t get identity until November. |
| **Virtual & Hybrid:** |  |
| Is online registration required? | NA |
| Are badges required? | NA |
| Is a streaming platform/microsite required? Include information on complexity if you know it | NA |
| Do we need a studio? | NA |
| Where will the chair-person be? | NA |
| Where will the speakers be? | NA |
| Will creative be needed? NB we will need to produce the basics like lower thirds/holding slide as standard | NA |
| Online audience numbers? | NA |
| Any satellite events? | NA |
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| **In Person & Hybrid:** |  |
| Is registration/badging required? | Not yet…  Being looked after by Visibo but it wouldn’t surprise me if they ask us to get involved in some capacity |
| Venue location | The Londoner, Leicester Square |
| Will all speakers be at the venue? | Yes |
| In person audience numbers? | UK day – 180 inc staff  Global – 160 inc staff |
| Any satellite events? | Not at the minute. Could be asked to get involved with the sales dinner on Thursday evening. Venue TBC. |
| Creative required? Print | Yes, lots. Charlotte will be heavily involved. The event creative will be aligned to the overall brand position (mentioned above)  We need to focus on (in no particular order):   * wayfinding that works and will actually help delegates navigate the venue * branding that compliments the venue as The Londoner has a very specific style * producing a branding map of all options/confirmed pieces * The Londoner need to sign off on any branding installed, they should have continual sight of the branding map so they can flag any potential problems * moving away from overly corporate M&G. New branding is all about letting personalities shine through, they want the event branding to be personable * the branding to be visible – M&G are back!   To note… they are launching an internal magazine called ‘ampersand’ as part of the re-brand. The event should embody everything the magazine is trying to do (personify branding, less corporate, trying to let personalities shine through)  Would like to start looking at branding straight away. Start on the branding map with suggested locations/ideas, actual images/design can be looked at when we get the artwork/guidelines in November  Would like to get a timelapse of the build |
| Suggested use of space | We need to do a walk round to explore options, but below is what M&G are currently thinking…  Main platform (plenary)   * Ballroom * theatre style * may need to split the space into two for the breakouts – will only know this once Alex Matcham starts pulling the agenda together   BO spaces   * ideally these will mainly take place on -3, with a ‘big picture’ session in the Ballroom on -2 * possibly two in the Ballroom if they run out of rooms   Staff lunch   * both days in the Green Room, -1   Delegate lunch   * both days in the delegate foyer   Drinks reception on day 1   * Green Room, -1   Luggage drop on day 2   * Green Room, -1   Drinks reception and gala dinner day 2   * Ballroom and Ballroom Foyer |
| AV | Main platform set   * Almost no storage on site, need to take our flight cases off site * Would like to keep the main stage set fairly simple in terms of branding, keep the branding to the screens * Stage cannot block the fire exit doors along the back wall * Would like to briefly explore doing the main session in the round * Design needs to be able to be split into two, including the PA system (even if they say they don’t want it now, I think they will change their mind nearer the event so would be good to have a flexible stage set)   Breakouts   * Laptop / screen in each room * 1 tech to cover 3 / 4 rooms for support |
| Anything else | Would like to do some teaser clips to promote the UK day, possibly clips from last year’s highlights – ‘M&G are back’ type thing.  They are thinking about session scanning and badging. Going to talk to visibo but might come back and ask for our support in areas.  Any ideas for something cool / different etc they would like to hear about |
| **Client details** |  |
| How is the team made up that work on the event? | Fiona – head of the team, will keep an overview of everything but may not attend every meeting.  Georgia and Becci – will be our key contacts day to day. Becci generally has more logistical and delegate responsibilities, Georgia generally more creative/speaker management  Alice – team assistant  Mia – new starter, very junior |
| How many other stakeholders are involved in the event? | Lots of internal stakeholders:  Joseph Pinto, CEO Asset Management – signed off spend, doing both openings, his first event, will be a lot of pressure to deliver in front of him, very into detail, come from Natixis  Andreas, new CEO, has come from AXA, will have eyes on this event  Alex Matcham, Head of UK Sales – this event is his baby, he structures the content and will make requests that the event team will have to find a way to deliver  All sales managers – they use this event as an opportunity to network and build relationships with their clients. They have high expectations and will vocalise when not happy |
| What is the line of approval? |  |
| Who is/are our key contact(s)? | Georgia, Becci – Fiona kept in the loop |
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| **Venue search – please complete this in as much detail as possible, if the client doesn’t have the answers, the EM would need a face to face with them before starting** | |
| Dates – maximum four dates, venues generally don’t let you hold more than two dates at any time | NA |
| Audience numbers | NA |
| Room set up | NA |
| Breakout rooms? Audience numbers and room set up details needed for each room | NA |
| Any other rooms needed? – speaker room / staff room / prayer room / changing room etc | NA |
| Location – be as specific as possible. E.g. Zone 1 instead of London | NA |
| Style of venue – 5\* hotel / 4\* hotel / Livery Hall / Royal College / Museum / Restaurant / Bar / Studio / Loft / Historic / Modern / Traditional etc | NA |
| Rig day? | NA |
| Bedrooms? | NA |