



# PHARMA MEETINGS REVISITED

Resources for navigating the pandemic era for medical meetings

## R<sub>x</sub> for Success

Welcome to our fourth eHandbook. We hope you enjoy this format and the information we strive to bring you about key segments of the meetings and events industry.

In this installment, we cover pharma and medical meetings.

As this segment awakens from its COVID-19 slumber, those who plan its meetings and events have undergone a rapid transformation to providing virtual and hybrid programs. Nothing like being thrown into the deep end and being told, “Swim!,” eh?

But with any pain comes progress and a widening of the expertise planners can leverage to engage and inform attendees no matter what platform a meeting utilizes.

We’ve tapped some of the foremost experts



**Tyler Davidson**

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in pharma/medical meetings for this eHandbook, so we hope you benefit from their wisdom as we ramp up to resume in-person meetings with a whole new set of tools.

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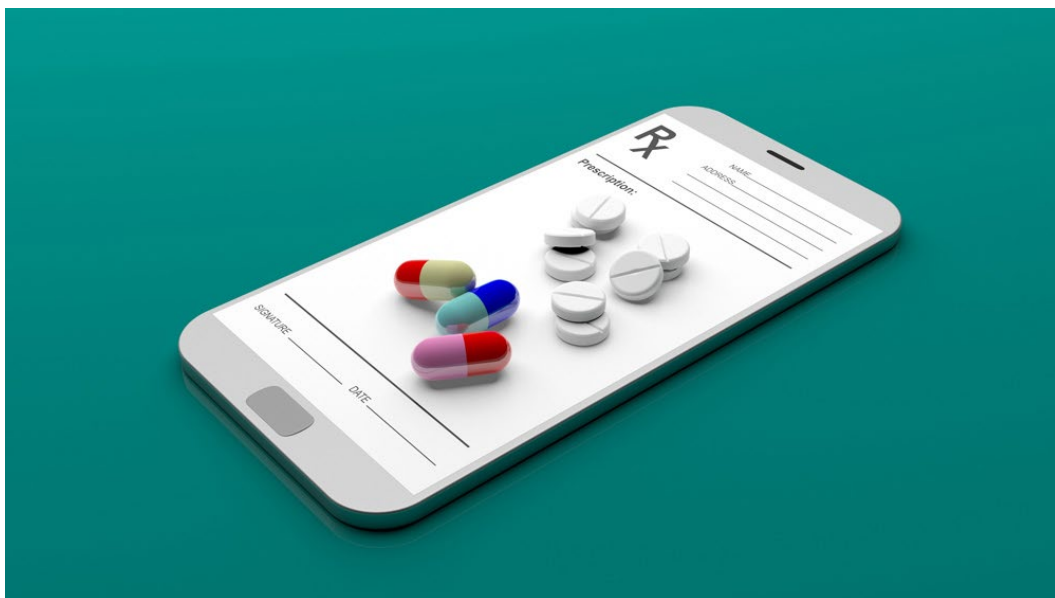
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# How Pharma Meetings Have Adjusted to the Virtual World

By Tyler Davidson

While hospital workers are on the frontlines fighting the COVID-19 pandemic, PhRMA (Pharmaceutical Research and Manufacturers Association) is leading the pharma industry's effort in navigating the crisis.

A Washington, D.C.-based trade association comprising 35 biopharmaceutical companies, PhRMA is a conduit of sorts for news about how the industry is coping.

"Pharma meetings, international and nationally, have taken a huge hit because everything's virtual," said Sharon Lamberton, deputy vice president of state policy for PhRMA. "The associations can't do their normal conferences, which is a huge revenue generator. Zoom only goes so far."

Lamberton said that many of the association members of PhRMA are offering educational content—critical for health professionals to keep up their certifications—and collaboration via online channels. Patient group conferencing has also been accomplished via platforms such as Zoom.

"We're very concerned about how we can get our information and treatments out to patients without our normal meetings," Lamberton said. "That means that we have to pick up the phone and talk and do the Zoom meetings no one likes anymore."

Besides representing the interests of its members, Lamberton estimates she has personally delivered some 150 talks during

the pandemic, and said PhRMA is very receptive to being a resource to help pharma/medical meeting planners develop and deliver relevant content for their audiences.

“Our industry is extremely interested in helping the meeting planning business,” Lamberton said. “We can provide expert speakers, such as big-picture [speakers] or specialists. It’s doing that old-fashioned connection—pick up the phone and tell



SHARON LAMBERTON

me what you need. We need to really rely on each other, especially in these times.”

One benefit presented by the pandemic is that expert speakers—and speakers in general—are less expensive and have increased availability because air travel is not required to deliver a presentation to an in-person audience.

“The benefit is we’re able to get some

top-notch speakers because they’re doing it with their PJs on and don’t have to travel to Tokyo or New York,” she said. “We haven’t seen these people being able to command high attendance, but it’s good that we’re able to draw higher-level talent to participate.”

Lamberton said the buzz around the industry is that in-person meetings will begin to gather steam again starting in the third quarter of 2021. She is also guardedly optimistic about the progress of the various vaccines that are being distributed. About half of PhRMA’s members are involved in producing COVID-19 vaccinations, she estimates.

“It looks like there will be two additional Phase 3 candidate vaccines in the next months for FDA review and emergency use authorization,” Lamberton said. “Phase 3 is in the pipeline, and that’s the last phase that needs to be completed for clinical trials.”

## Pharma Meetings Go Virtual

Bishop-McCann, an experiential branding agency that produces meetings, events and incentive programs worldwide, includes a business unit that specializes in small pharmaceutical industry meetings.

That effort is led by Dave Eckberg, head of Pharmaceutical & Franchise Client Groups. Eckberg said the bulk of his group’s work for the pharma industry currently involves Zoom meetings for smaller groups such as advisory boards. Most of

the meetings max out at approximately 15 participants, who often are physicians.

Eckberg said harnessing Zoom-like platforms' ability to create breakout rooms is key to effective participant engagement, and that Bishop-McCann has discovered some additional benefits while navigating the now-ubiquitous world of virtual meetings.

Always a very heavily regulated meetings industry segment because of oversight by the Physicians Payments Sunshine Act, passed by Congress in 2010 to create



DAVID ECKBERG

transparency and battle perceptions of payola of health care providers from health care corporations such as pharmaceutical companies, little has changed in this aspect of pharma and medical meetings, pandemic or no.

“One of the things we’ve found is that it’s critical to gather all of their information during registration. You wouldn’t think that’s so critical with small groups, but when it comes down to the final reporting

that needs to be done, we really need that information,” Eckberg said. “Also, honorariums and gathering tax info; on behalf of our pharmaceutical clients we can make those payments with them, which is an enhancement to our core services that we’ve been focused on during this time.”

### **Gifting Options in a Virtual World**

Honorariums, gifts and the reimbursement of travel and accommodations expenses have always been an element of pharma and medical meetings. The Sunshine Act at its most basic seeks to create transparency and firm reporting requirements of any gift or payment to healthcare professional meeting participants.

The pandemic has resulted in much simpler reporting requirements, as travel and onsite meals have been rendered a non-issue.

“Mostly what we were reporting for HPC [health professions conference] meetings were food and beverage, rooms and transportation,” Eckberg said. “Now it’s more just honorariums, really. There’s no travel components anymore—it’s over Zoom, so no hotel rooms, food, all of that.”

While the Sunshine Act is notoriously labyrinthine, with different regulations depending on the country or U.S. state where the meeting is being held, Bishop-McCann in late 2020 pivoted to launch a new company, Eventure, to deliver customized gifts and even food to online meeting

participants.

“We’re doing gift boxes and engagement boxes that get sent out ahead of time with instructions on what to open when,” Eckberg said. “While we were providing breakfast before, now we’re offering a breakfast bar and breakfast drink. We’re finding ways to engage them through their tactile senses—such as taste and touch—with phased box openings, to create some sort of surprise and delight.”

Eckberg said that Eventure can customize the gifting to reflect a specific region, and also places an emphasis on using Black- and locally owned vendors since it launched.

## Prognosis for Recovery

Like PhRMA's Lamberton, Eckberg is optimistic that the pharma meetings segment will start showing signs of recovery in the second half of 2021.

“We are all very optimistic,” he said. “We have brought a good portion of our company projections back—we’re looking to be about 75% of previous years. I think quarter one and quarter two are going to continue to be challenging until people get vaccinated. We feel like [quarters] three and four feel more promising. But that said, I think there will always be hybrid and virtual—people may not feel comfortable traveling for a year, but that’s a worst-case scenario.

“We sometimes plan a year out, so we’re going to be busy even before some of the hotels and venues, so we’re optimistic about that,” Eckberg continued. “One of the things we’ve encouraged our clients to do is even if they’re not ready to commit to [quarter] three or four, let’s get a proposal together and see what’s available and negotiate a really good clause in our contracts for a good out. I think when it comes back it will come back with a fury, and availability will be limited, and that’s going to be difficult for clients to understand.”



## Tyler Davidson

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Tucked within maritime forests, along salt-water marshes and golf courses or perched above a shoreline that beckons the waves of the Atlantic, private Resort Villas offer meeting attendees effortless access to event spaces and island amenities. When it is time to inspire and reward your team, The Sanctu-

ary—a Forbes Five-Star, AAA Five-Diamond oceanfront hotel—is the ultimate destination for corporate incentive travel.

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- Unspoiled natural environment on a secluded barrier island
- Situated on a 10-mile, award-winning beach along the Atlantic Seaboard
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# Post-Shutdown Features

## Ensuring Attendee Health and Safety

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food safety throughout the Resort.

As a beautiful nature preserve, Kiawah Island has always boasted vast blue and green spaces ideal for group gatherings. The Sanctuary has multiple indoor spaces with outdoor elements for seamless transitions from general sessions into team-building activities. We can even host an open-air event—complete with audio-visual support—canopied by ancient oaks draped in Spanish moss at Mingo Point on the Kiawah River.

# Facility/Destination Highlights

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In perfect harmony with its coastal environment, The Spa at The Sanctuary offers a menu of therapies inspired by the sea. Perennially awarded Five Stars by Forbes Travel Guide, The Spa provides a pampering escape. The Resort's five championship golf courses, award-winning tennis center and more than 100 recreational activities offer

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## 5 Experts on the State of Pharma Meetings During the Pandemic

By Tyler Davidson

Pharma and medical meetings, like all other segments that rely on in-person meetings for education and collaboration, were throttled by the COVID-19 pandemic.

But like its counterparts, pivot is the operative word for those who work to bring healthcare professionals together with pharmaceutical and medical companies and organizations.

“I think we are beginning to see a little movement in face-to-face meetings, especially with the move to hybrid meetings,” said Pat Schaumann, director of Life Science Development at MGME and founder and manager of the Healthcare Meeting Compliance Certificate (HMCC) program for MPI. “I definitely think pharma/medical device sales reps are anxiously awaiting the

physician/HCP sales calls. Most physicians have stopped seeing sales reps during the virus and the number of sales reps is down for the first time in many years.”

Schaumann is widely considered one of the foremost experts on pharma/medical meetings, being the author of *Breaking the Code to Healthcare Compliance, 5th Edition*, which is the resource for the HMCC, and also writing the *MPI CMP Healthcare Training Manual*, a resource book for the Event Industry Council’s CMP-HC certification program.

Following are the opinions of four more experts who work in the pharma/medical meetings world about the status of that segment as meetings emerge from the massive disruption caused by the pandemic.

**Jeannie Wert, President, HCEA;  
Director, Exhibit Management,  
Siemens Healthineers**

A key aspect planners need to keep in mind in this “new normal” of virtual/hybrid meetings is that the high level of detail and quality planners strive for in an in-person event must carry over to the digital realm.

“People think with digital you can do it with the tap of your fingers, and that’s not



JEANNIE WERT

the case; you really have to produce them,” said Jeannie Wert, director of exhibit management for Siemens Healthineers. “Even in big companies, resources can be scarce, and when

you think of hybrid on the horizon, it’s a double-down scenario.”

One advantage with larger healthcare companies is that they often have other departments a meeting planner can tap to make their virtual/hybrid programs more engaging.

“Larger companies have social media teams, so make sure they’re integrated into those projects for programs, and leveraging those networks,” she said, adding that whether the program is in person, hybrid or

virtual, content is still king.

“That’s a huge draw for the attendee,” Wert said. “Whether that’s in person or digital, they’re coming for education.”

**Laine Mann, Vice President,  
HCEA; Director/Global Congress  
Lead, Pfizer**

For any meeting or convention, audience need is always the top priority, and everything else flows from that. Networking events in particular have been a huge challenge during the sudden shift to virtual/hybrid events, so creativity and tapping key audience members has been key.

“The biggest change for me is the audience,” said Laine Mann, vice president of HCEA (Healthcare Convention & Exhibitors Association) and director/global congress lead for Pfizer. “Digital influencers, who have really emerged in the virtual events world, are digital natives who live in social media.

These are the ones that are tweeting and retweeting everything, following peer-to-peer. What we’ve lost in the digital world is that peer-to-peer networking to say, ‘This is what I learned in a session and here’s



LAINE MANN

how I put it into practice.’ This is where you’re seeing a stronger influence of affinity groups in the digital world.

“Focus on your audience and develop those personas beforehand, and then focus on that content,” Mann advised. “Put the healthcare professional in the center. The fewer the clicks for them to get to the content, the better.”

### **Karen Hanover, Account Director, Informa Connect, Biotech & Pharma**

Karen Hanover is a leader of Pharma Forum, the largest annual forum dedicated to life sciences meeting and event professionals.

“We usually do one per year, but obviously because of the pandemic, we are now doing the virtual one and the live one, and then will go back to the one-on-one format,” she said. “It’s touch and go. We’re trying our best to do it, but as time has gone on things have gotten a little better.”

Hanover said Pharma Forum tapped a new hybrid meetings platform, Totem, which has helped enhance the experience for attendees because it has provided more ways to network with peers and exhibitors/sponsors, which is still the key element of any pharma/medical meeting.

“Networking is a huge challenge because people don’t feel compelled to network, visit booths, etc.,” she said. “With the sponsors and exhibitors, it’s a place where people get their ROI—you’re not doing the organic thing at the coffee stand

anymore—but we get a lot of analytics that you don’t get at a live event.”

“It’s very interactive,” Hanover said of the Totem platform. “Some people say it’s more like Tinder dating, but as virtual goes on, people are becoming more comfortable, but it’s still a work in progress.”

Hanover has seen a variety of advantages to the virtual/hybrid format, however.

“Having the ability to watch the session on demand for 30 days is helpful,” she said, “and we’ve absolutely expanded the audience. We get the 800 we usually get [for an in-person event], but the [virtual] one we did last year, we got 2,000 people.”

### **Taya Paige, Business Loyalty/ Culture Transformation/Employee Engagement/Experience Design, ITA Group**

Twenty-five-year meetings industry veteran Taya Paige, who works with global full-service meetings, events, incentives and employee engagement company ITA Group, heads up the Healthcare & Medical Meeting Professionals Community Advisory Board For MPI, managing the pillars of that effort: advocacy, research and compliance, and outreach/engagement.



TAYA PAIGE



“Honestly, it’s a really fascinating time to be in this industry,” Paige said. “Engaging people in general is transforming before our eyes, so to be here in this evolution is really cool, despite all that’s happened. It was time to go more digital anyway, so this gave us another push.”

Getting a certification through programs such as MPI’s Healthcare Meeting Compliance Certificate (HMCC) is a good strategy for meeting planners as the industry, and segment, begins to wake from its pandemic slumber.

“It’s a good time to get certifications, as I think there’s a great opportunity to engage virtually, and for those who are vaccinated, to get them back to meetings,” Paige said.

Paige added that through her work with MPI and its Medical & Healthcare Professionals community, the association is providing a key resource to both members and non-members during a chaotic time in the meetings and events industry.

“We’re looking to build a global roundtable to have everyone from regulation to getting back to meetings and [participate] with influencers in their part of their world,” Paige said. “We did three different webinars in 2020 about the transition of medical meetings, and now our idea is to really expand that and bring in people who are from all over the world.

“We’re really just trying to bring them together so we’re more of a global voice,” she continued. “It’s not that we can

standardize things, but we can talk about what’s happening and keep best practices in a resource center, and [detail] regulations, such as food [spending] caps, so you can go to the regulatory resource center and get a best practices sheet. We’re really trying to become a resource center for the industry, and then even connect people who need jobs with job openings.”

Paige said that MPI, in keeping with its mission of serving everyone in the meetings industry, is currently offering access to its Medical Meetings Community for free.

“A lot of people can’t afford to join MPI now,” she said. “It’s sponsored, so we’re trying to get furloughed people, educators and compliance people—I think to have this best practice resource center could be a game changer for these people.”



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## 3 Medical Meeting Compliance Programs for Planners

By Tyler Davidson

Planning any type of meeting or event is always a stress-inducing affair—pandemic or not—but with the rampant regulations in the murky world of pharmaceutical and medical meetings, planners best know the lay of the land before they accept the mission.

But investing the time and money to get a healthcare meeting planning compliance certificate or certification could be a wise career move.

“It’s something that the average person just entering the marketplace would have a hard time just jumping into the full-time planner position,” said Betsy Bondurant, a medical meetings expert and president of Bondurant Consulting, as well as the head of U.S. Operations for 3Sixty Event

Consulting and Healthcare Venue Solutions. “One of the challenges is the HCPs [healthcare providers] still don’t understand what open payments and the reporting is all about, and don’t understand if they come to meetings they can’t bring their wives anymore, and why isn’t there a nice band playing during dinner?

“It’s a fine line, and [it demands] people who are well seasoned and know how to have those conversations, and when it’s time to reach out to their client and get them involved.”

On top of understanding, and allaying, the concerns of meeting attendees—often doctors and executives who are well accustomed to a high standard of entertain-

ment and F&B that would draw regulatory scrutiny—meeting organizers and planning teams must navigate a maze of regulations that differ depending on location.

“You’d have to stay on top of what’s happening in the state, but then also the U.S. federal code, but then there’s 10, 12, 15 city codes,” Bondurant said, adding that new global regulations restricting physician travel to meetings is adding a new problematic wrinkle.

“We’re now seeing even more regulations

in Europe, where it used to be that a lot of pharma companies could support travel for European physicians,” she added.

“There used to be 40%-plus [physician attendance] from outside of the U.S.,” Bondurant said. “Now the physicians are not able to

accept that support, so how is that going to impact their education and ability?

“I think it’s important for people to understand that it’s not just U.S. regulations,” Bondurant continued.

“There are actually 89 countries that require them,” she said. “The rules and regulations are everywhere. There’s the European Federation of Pharmaceutical Industries and Associations, ones in China and Japan and South Africa and Peru...

It’s just so hard from a meeting planner perspective.”

## Medical Meeting Planner Certification Programs

The main point of difference in the pharmaceutical and medical meetings segment is between regulated and non-regulated events.

Planners of most any stripe can handle the logistics and other elements of non-regulated meetings, such as medical company sales meetings. But when healthcare providers are entered into the equation, it’s a whole new ballgame that requires specialists leading a planning team.

“Some of the larger companies may have 60 people on their planning team,” Bondurant said. “I would expect the agencies, such as Maritz or Ashfield [Healthcare], have staff that is fluent in the regulated [items] and some that are not doing that.”

“They may not need to know the regulations in general but need to understand what each individual company’s interpretation of the regulations are.”

Fortunately for meeting planners, suppliers and the organizations that rely on them, certificate programs are available to help steer the way, especially when it comes to regulated meetings.

Following are three of the major healthcare meetings certification programs currently available.



BETSY BONDURANT

### **3Sixty Event Consulting and Healthcare-Venues' Compliance Program**

Represented in the U.S. by Bondurant, 3Sixty Event Consulting is a U.K.-based company that is bringing its healthcare compliance training program to the U.S.

According to Bondurant, the following attributes are what makes its Healthcare Champion training program—run in conjunction with its sister company, Healthcare-Venues.com—stand out:

- It teaches tailored methodologies for those managing healthcare meetings.
- It provides an extensive exam, some elements of which are marked by its trainers, covering the skills needed to deliver healthcare meetings.
- It provides perspectives when organizing national, “one-code meetings,” or international meetings where multiple codes need to be considered.
- The content is applicable globally.
- It provides a 12-month certification, renewable annually.

“Our courses are an intensive educational environment where real-life scenarios and skills development are central in understanding how to integrate compliance into every step of the meeting management process,” Bondurant said. “Tailored methodologies ensure the specific needs of corporate meeting planners, PCOs, meeting management companies, venues

and all other parties involved in healthcare meetings are brought into simplified focus. The result: certificated individuals representing organizations that are empowered to deliver compliance solutions for international and national meetings.”

The compliance courses are available online or in face-to-face or hybrid formats.

An Events Industry Council (EIC) preferred provider, the content is also available in an on-demand format and provides a certificate upon completion. The cost is \$549 per person, with training fees for groups based on company requirements.

As an added benefit of the Healthcare Venues relationship, users can access venues' COVID-19 Secure Assessment Reports free of charge. These reports focus on the fine detail, required by meeting planners to be confident that a venue is secure and can demonstrate this effectively.

### **MPI: Healthcare Meeting Compliance Certificate**

MPI offers the Healthcare Meeting Compliance Certificate (HMCC), which is the only compliance training of its kind specific to the regulatory challenges encountered by meeting professionals organizing or hosting pharmaceutical/life sciences, medical, biomed and medtech meetings, according to the association.

The certificate is valid for two years and can be renewed via a webinar.

The four-hour course, which is offered



at various meetings industry events, costs \$513.99 for MPI members and conference registrants, and \$713.99 for the standard rate. Registrants can purchase the Breaking the Code to Healthcare Compliance, 5th Edition (\$89.95) textbook to read prior to the session.

There are also European, Asian and Canadian versions of the curriculum.

According to MPI, participants will earn four clock hours in the Strategic Domain A: Strategic Planning area of the CMP program and learn the following:

- What qualifies as a healthcare meeting.
- A baseline of knowledge about healthcare meeting compliance.
- A basic understanding of the reporting requirements.
- What questions to ask, given their role in healthcare meetings.
- What information to convey to their teams.
- How guidelines/rules are constantly changing, so planners need to verify, verify, verify.

To further participants' education and career growth, the association also offers the MPI-MD peer community of medical and healthcare meeting professionals to MPI members.

According to Jessie States, director of the MPI Academy, new for 2021 is a digital credential those who complete the HMCC course can display to recognize their expertise in the segment.

## EIC: CMP-Healthcare Subspecialty

Launched in 2013, the Events Industry Council's CMP-Healthcare Subspecialty, or CMP-HC, program is available to any meeting professional who holds a valid CMP certification.

To earn the CMP-HC designation, planners with a CMP designation must document 36 months of experience in healthcare meeting management and five clock hours of professional development specifically related to healthcare meeting management that has been completed in the past five years.

After meeting these qualifications and submitting an application, which costs \$155, participants pay a \$280 exam fee and then take the exam within one year of the approval of the application.

Planners are required to recertify every five years (\$175), which is aligned with their CMP renewal.

"The CMP-HC is the preeminent certification for CMPs who focus on healthcare meetings management," said Amy Calvert, EIC's CEO.

"The CMP-HC designation is awarded to recognize CMPs who meet the established prerequisite education and experience requirements, as well as the rigorously comprehensive exam," she added.

"CMP-HCs continue to



AMY CALVERT

demonstrate their continued professional competency through continuing education and experience to maintain this specialized credential,” Calvert continued. “That’s why the CMP-HC holds a distinguished place in the healthcare meetings market.”

As a point of difference, the EIC issued the following comparison between its certification program and other programs, which provide a certificate:

#### **EIC Certification Program Basics**

- Results from an assessment process that recognizes an individual’s knowledge, skills and competency in a particular specialty.
- Typically requires professional experience.
- Awarded by a third-party, standard-setting organization, typically not-for-profit.
- Indicates mastery/competency as measured against a defensible set of standards, usually by application or exam.
- Standards set through a defensible, industry-wide process (competency profile/job analysis) that results in an outline of required knowledge and skills.
- Typically results in credentials to be listed after one’s name (CMP, CMP-HC).
- Has on-going continuing education requirements in order to maintain; holder must demonstrate he/she continues to meet requirements.

#### **EIC Certificate Program Basics**

- Results from an educational process.

- Indicates completion of a course or series of courses with a specific focus (different than a degree-granting program).
- For newcomers and veterans.
- Awarded by educational programs or institutions.
- Course content determined by the specific provider or institution, not standardized.
- Usually listed on a resume detailing education.
- Demonstrates knowledge of course content at the end of a set period of time.

No matter what medical meeting compliance program a planner chooses to pursue, it definitely seems the benefits of certification are worthwhile for those looking to branch out in their meeting planning careers.



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