



DISTRICT OF COLUMBIA DENTAL SOCIETY
Nation's Capital Dental Meeting



Request for Proposal/Invitation to Bid

RESPONSE TO RFP
AND PROPOSAL FOR
MEETING REGISTRATION SERVICES

Submitted by:

BUZZREGISTRATION

3525 Quakerbridge Road, Suite 909

Hamilton, NJ 08619 USA

(609) 689- 2954

<http://www.buzzregistration.com>



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Section 1. Overview and Background Information

1.1 Purpose of this Proposal

This document is a proposal for BUZZ Registration (BUZZ) to provide comprehensive meeting registration services relating to the 82nd annual meeting of the District of Columbia Dental Society (DC Dental Society, DCDS, or Society), to be held [REDACTED] at the Washington Convention Center in Washington, DC.

This proposal is submitted in response to the Society's Request for Proposal/Invitation to Bid (RFP) dated [REDACTED], and is submitted with the understanding that registration for [REDACTED] meeting will be open in mid-[REDACTED].

For convenience, Section 3 of this proposal is presented generally in the same order and numbering format as the RFP.

1.2 Situation Analysis

4.2.1 The DC Dental Society

The DC Dental Society is the professional association representing dentists in the Nation's Capital. In existence since 1866, the Society is equivalent to a state chapter of the American Dental Association. DCDS has approximately 600 members.

DCDS is committed to the growth of the dental profession through educational programming, advocacy for members, and raising the oral health literacy of the community.

In December 2012, DCDS reiterated, refocused, and amplified this commitment in the District of Columbia Dental Society Strategic Plan: 2012–2016 (Strategic Plan).

4.2.2 Annual Meetings

DCDS conducts annual conventions known as the Nation's Capital Dental Meeting (NCDM or Annual Meetings).

The NCDM began in 1931 as a one-day lecture attended by a few hundred dentists and friends. Over the last 81 years, the NCDM has grown into to the largest dental meeting in the Mid-Atlantic region—and one of the most prestigious meetings in the country—typically attracting 3,000–4,000 attendees annually from around the world.

IN A NUTSHELL

DCDS Annual Meetings attract international attention and are the focal point of the year.

At present, all meeting planning, registration, and management functions are handled by dedicated DCDS staff.

This task is time consuming and labor intensive—and much of it is done manually.

But the task can be made much easier.

Off-loading the entire registration and data gathering process to BUZZ—before, during, and after the meeting—offers a proven, plug-and-play solution.

A solution that removes all meeting registration worries and pain points for DCDS through a combination of people-power and technology.

Through BUZZ, DCDS staff is relieved of the countless details, yet stays in control of the process. In fact, gains **better** control. The BUZZ team serves, supports—and reports to—DCDS staff.

The BUZZ solution adds value to DCDS. It enhances the Annual Meeting experience of attendees and exhibitors by streamlining the entire registration and check-in process. This helps to bring them back next year, and to bring other colleagues along.

This result is aligned with—and promotes—the objectives of the Society's Strategic Plan for 2012–2016.



Annual Meetings include general sessions open for all attendees and various break-out sessions, clinics, and seminars (including those for CE credit) that require separate registration and payment of a separate fee (clinics).

Annual Meetings also have a trade show component that attracts approximately 130–160 exhibitors who display their goods and services in a DC Convention Center Exhibit Hall. Each exhibitor registers separately and pays a separate fee for its booth.

Annual Meetings have their own dedicated website.

During the three-day Annual Meeting, on-site support for attendees and exhibitors is provided by DCDS staff and paid employees of the Convention Center. DCDS staff is responsible for orienting, training, supervising, and managing on-site Convention Center personnel. DCDS pays Convention Center employees by the hour.

The Society's Annual Meetings are the focal point of its operations each year. And each year, the Annual Meeting represents a formidable logistical and operational undertaking.

DCDS STRATEGIC PLAN AND THE NCDM

In the Society's Strategic Plan:

- Strategic Goal 1 is to "Provide support to members so that they may succeed and excel throughout their careers."

One of the measures of success in achieving that goal is an "Increase in annual meeting attendance."

- Strategic Goal 2 includes "Providing educational opportunities, and member benefits, that will encourage membership and attendance at the NCDM."

4.2.3 2014 NCDM Fast Facts

Current website <http://thencdm.com/>

Registration Attendees: 3,000 (based on [REDACTED] NCDM)
Exhibitors: 150 companies/booths

Past locations Washington Convention Center, DC

Future Locations [REDACTED] Washington Convention Center, DC

4.2.4 Going it Alone: DCDS Pain Points

At present, DCDS goes it alone, acting as its own meeting planner. DCDS staff:

- Selects the meeting and housing sites.
- Organizes clinics, clinic topics, and faculty.
- Coordinates with various state CE authorities.
- Manages all pre-meeting, on-site, and post-meeting inquiries, registration, and data gathering for thousands of attendees and hundreds of exhibitors.

The Society's meeting planning and registration process and activities involve countless details, and are extremely time consuming and labor intensive.

DCDS staff has mastered the process and does a great job. DCDS Annual Meetings are both prominent and prestigious. They attract international attention and attendance.



But even a well-performed job can be improved and made much easier. The Society's Annual Meetings can become even bigger and even better. And this can happen—virtually overnight—when a solution is readily available that removes pain points and adds value.

For DCDS, these desirables can become a reality by out-sourcing the entire registration process for Annual Meetings.

The current registration process bears out this conclusion, and suggests fertile opportunities for DCDS to benefit from registration outsourcing. For example:

Attendee Inquiries and Support

<u>Current Practice</u>	Attendee inquiries and support are handled manually.
<u>Solution Opportunity</u>	This manual work can be readily outsourced, freeing up DCDS staff.

Attendee Registration and Check-In

<u>Current Practice</u>	Attendees can register manually, online, or “at the door.” During online registration, attendees have the option to purchase additional educational sessions. For each attendee name badges, and tickets—for the meeting in general and for the selected various separate admission sessions—are assembled and mailed manually. DCDS does not currently utilize electronic ticketing or badge scanning technology. For the typical meeting, this means that about 3,000 separate envelopes must be manually stuffed and mailed, with related high postage costs. Convention Center staff handles on-site check-in and registration via five or six check-in desks. For “at the door” registrations, attendees must wait in line. Each attendee manually fills out a form and provides the form and a business card to registration staff. Staff then manually types in the information and provides the attendee with a badge. From there, each attendee goes to a ticket desk where he or she can purchase tickets to educational sessions. The ticket desk is manned by a volunteer DCDS member who collects credit card payments. During the meeting, entry tickets are checked manually.
<u>Solution Opportunity</u>	Manual functions can be easily outsourced to free up DCDS staff. Electronic ticketing and scanning technology can be utilized to issue credentials and a single, scannable ticket for each attendee. This single ticket will enable electronic check-in at the meeting in general and at each separate event that attendee has registered for. This technology will save postage costs, reduce or eliminate waiting lines on-site, make on-site management and support much easier, and enhance the attendees' on-site experience.



Exhibitor Registration

<u>Current Practice</u>	Exhibitors register manually via email attachment or fax. Their information is input manually by DCDS staff into an online system. Once this is done, exhibitors must log in to the online system to register their booth personnel. Booth staff for each exhibitor must be registered individually—the current system cannot accommodate group registrations.
<u>Solution Opportunity</u>	Manual functions can be easily outsourced to free up DCDS staff. Technology can be utilized to make the make the entire invitation and credentialing process for exhibitors and their attending representatives electronic. This technology also enables each exhibitor to register booth staff as a group during a single online dialogue.

Rosters

<u>Current Practice</u>	Attendee and exhibitor rosters are generated manually.
<u>Solution Opportunity</u>	Manual functions can be easily outsourced to free up DCDS staff. Technology can be utilized to generate electronic rosters, which also lightens the labor load.

Event Staff Management

<u>Current Practice</u>	DCDS staff is responsible for orienting, training, supervising, and managing on-site Convention Center personnel.
<u>Solution Opportunity</u>	This entire function and responsibility can be off-loaded to an outsource partner. It is likely that fewer Convention Center employees will be needed, reducing labor costs.

Payments

<u>Current Practice</u>	Attendee and exhibitor payments, including credit card payments, are verified and processed manually.
<u>Solution Opportunity</u>	Manual functions can be easily outsourced to free up DCDS staff. Technology can be utilized to process payments on the attendee/exhibitor end, increasing efficiency and reducing delays and errors.

Post-meeting Data and Reports

<u>Current Practice</u>	Post-meeting data and reports are compiled and generated manually.
<u>Solution Opportunity</u>	Technology can be utilized to create customizable reports from data supplied electronically by attendees and exhibitors.



Exhibitor Leads

<u>Current Practice</u>	Exhibitor leads are compiled and generated manually.
<u>Solution Opportunity</u>	Technology can be used to generate leads electronically. Exhibitors pay for these leads. The revenue generated can be shared with DCDS, creating another revenue stream.

The more DCDS offloads the registration process, the more it can relieve its pain points, free up staff resources, create value, and enhance the Annual Meeting experience for members, attendees, and exhibitors.

1.3 Outsource Partnering with BUZZ: Removing Pain Points, Seizing Opportunities

DCDS needs a proven meeting registration partner that will remove its meeting registrations worries and challenges.

A single “go to” resource that will consolidate, streamline, standardize, and take on the entire registration process for the Society’s Annual Meeting—and beyond—by helping DCDS realize the benefits of the solution opportunities described above.

BUZZ is that partner.

Section 2. About BUZZ Registration

2.1 BUZZ – A Division of Global Planners, Inc.

BUZZ Registration is a division of Global Planning, Inc. (GPI). GPI is a full-service event planning company for businesses, professional associations, and charitable/non-profit institutions.

About GPI

GPI handles conferences, meetings, CE seminars, and training campaigns for a diverse spectrum of clients, delivering an array of customized services for each—all backed by personalized, high-touch expertise and support.

Since its inception in 2000, GPI has evolved into an acknowledged player in the industry and a multi-million dollar company, with global reach and clientele.

GPI has managed hundreds of thousands of registrations for more than 3,000 meetings.

GPI is a certified Women’s Business Enterprise.

For more about GPI—and its people, capabilities, and accomplishments, please see [Exhibit 2.1](#) or visit <http://globalplanners.com>.





2.2 BUZZ – A Pioneer in Outsource Meeting Registration Management

The History of BUZZ

BUZZ evolved as a natural outgrowth of GPI's meeting planning business. Specifically, GPI discovered an industry niche for offering outsourced/a la carte services to other meeting planners and corporate planning departments who were not looking for full-service planning, but sought help with certain detail-laden, time-draining tasks.

In 2009, the industry—and the world—changed. In the throes of a global economic nose-dive, companies downsized. Budgets were cut. Internal meeting planning departments were stretched to the limit, and beyond. The need for outsource support intensified and demand spiked.

Megan Buzzetta, GPI's founder and President/CEO reached out to clients and met with them to see how GPI could help them navigate the new reality. She found a common thread: **registration**. Although numerous software platforms have been designed to support on-line registration, they offer a do-it-yourself solution. What meetings planners really wanted to lighten their burden was to delegate the registration function entirely—or at least have a separately priced line-item menu of services—from a trusted outsource partner.

Megan listened. In 2010, GPI's BUZZ Registration division was formally launched, with a mission to provide meeting planning companies and internal departments behind-the-scenes outsource-capability, functionality, and depth to take on and eliminate their pain points—all grounded in the core principles stated above, and based on the mantra "extend the client's team."

Propelled by GPI's capabilities, resources, and reputation, BUZZ has rapidly become a market leader in outsource meeting services.



Megan Buzzetta
Founder, President and CEO
GPI/ BUZZ Registration

CORE PRINCIPLES: GPI AND BUZZ

- Every meeting is different.
- Every attendee is a VIP.
- Partner with clients: listen and deliver.
- Don't meet expectations—exceed them!
- We win with our people.

GPI and BUZZ have kept faith with these principles for more than a decade.

2.2.1 BUZZ Services and Capabilities

BUZZ Registration's outsource services (*available as a whole or as unbundled, separately priced components*) include:

- Housing and sourcing.
- Contract negotiation.
- Comprehensive registration services, including:
 - Creating customized event registration websites for each meeting based on the client's style guide and specifications.
 - Managing the entire registration process:
 - Obtaining the client's invite list.
 - Working directly with hotel on room list.
 - Point of contact for attendees.



- Responding to attendee inquiries within two hours.
- Registration tasks include:
 - Master List set-up/management.
 - Invitation launch/management/registration tracking/follow-up.
 - Email reminders
 - Room list management.
 - Final confirmations.
 - Exception log.
 - Travel management.
 - Transportation services.
- Best in class call center service.
- On-site support.
- Creating ad hoc reports, including post-meeting reporting.
- Scanning and lead retrieval.
- Reconciling final bills.

2.3 GPI/BUZZ – Global Reach, Proven Track Record

Since its formal launch in 2010, GPI/BUZZ has provided professional comprehensive or a' la carte event planning services for more than [REDACTED] events.

2.3.1 Client List

BUZZ now provides outsource services to an array of meeting planners, professional associations, and other charitable/not-for-profit organizations. Registration services clients include the Autism and Asperger Association, CNBC, and Bank of America. A more complete list appears in Section 3.7(b) of this proposal.

PROVEN TRACK RECORD

GPI/BUZZ has managed hundreds of thousands of registrations for more than 3,000 meetings.

Since its formal launch in 2010, GPI/BUZZ has provided professional comprehensive or a' la carte event planning services for more than [REDACTED] events.

2.3.2 Customer Reviews

GPI/BUZZ clients are effusive in their praise. Here are some sound bites:

- WOW! I just got goose bumps—these are really good numbers for us this far out. Very pleased. Thank you! ...Lots of work on your part—thank you for making this as easy as possible for all of us.
- I'm all out of fresh ways to say—you rock. Thanks for making us all look good.
- It would be impossible to put these meetings together without you...All of the attention to detail and follow-up is amazing.
- You and your entire team are a pleasure to work with. I equate the individuals within your organization to the Secret Service. While the meetings are moving along as planned, you are there in the background shepherding the proceedings along. However, once there is a



participant, presenter or sponsor in need, you are there in a moment's notice ready to go above and beyond to meet their needs. I am grateful to have you as partners.

A more extensive list of customer reviews—and recommendations letters—are attached to this proposal as Exhibit 2.3.2.

2.4 BUZZ – Seven Key Differentiators

1. **Industry Pioneer. Industry Leader.** BUZZ was an early mover in outsource meeting support—particularly in meeting registration—and has quickly become an industry leader.
2. **Global Reach and Scalability.** Backed by the capabilities and resources of GPI, BUZZ has unparalleled reach in the outsource arena.
3. **Top Talent.** GPI/BUZZ hires only top-flight people, both personally and professionally. And rewards them for excellent performance.
4. **People Power Melded with Technology.** BUZZ doesn't offer do-it-yourself solutions. The power and benefits of technology are achieved with great people behind it.
5. **Proven Track Record.** As the testimonials in Exhibit 2.3.2 attest, clients give BUZZ the highest accolades.
6. **Corporate Culture** centered on expressed core principles.
7. **Enduring Relationships** with clients and employees.

SECTION 3 BEGINS ON NEXT PAGE.

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Section 3. DCDS Scope of Work and Requirements

This section follows the same numbering format as the RFP.

The information presented demonstrates that BUZZ Registration offers the key features and functions to provide the comprehensive solution—or the separately priced menu options—sought by DCDS.

3.1 Pre-Registration Requirements and Responses

- (a) **DCDS Requirement** Approximately 60% of attendees pre-register.
- BUZZ Response** BUZZ can easily accommodate any level of pre-registrations, whether done manually or electronically.
- (b) **DCDS Requirement** Provide attendees, exhibitors, volunteers, speakers, and VIPs the ability to register using the following methods:
- (i) on-line
 - (ii) fax
 - (iii) regular mail

BUZZ Response

Manual Registrations For everyone attending, exhibiting, or otherwise participating, the BUZZ Registration team will manage all online registrations and manually enter all registrations that come in via fax, phone, or email into the BUZZ registration software platform.

If DCDS decides to retain the manual registration function, BUZZ'S registration platform offers a user-friendly back office interface that allows for quick and easy client access for inputting data and processing.

Also, even if DCDS retains the manual registration function, BUZZ will provide credit card processing.

Online Registrations BUZZ Registration will create two user-friendly registration websites (which may be accessed through the event website). One website will be devoted entirely to registering attendees and the other website for registering exhibitors.

These websites will be built and customized according to DCDS specifications and style guide requirements.

The registration platform used to support both registration websites provides ease of navigation and an intuitive user experience, which is especially helpful for users who may not be familiar with online registration. Our registration software platform provides an exceptional user experience.



REGISTRATION FOR MEETING ATTENDEES

BUZZ Registration will create an online registration system for meeting attendees using the Cvent registration platform, enhanced by BUZZ Registration's own proprietary software. This system will enable issuing a single electronic, scannable badge for each attendee.

REGISTRATION FOR EXHIBITORS

BUZZ will automate the entire exhibitor invitation, credentialing, and management process through the dedicated registration website for exhibitors. The system will enable exhibiting companies to register their representatives based on their level of sponsorship, and to register all representatives at once, *as a group*.

GROUP REGISTRATIONS FOR ATTENDEES AND EXHIBITORS

BUZZ's web-based registration software platform allows attendees to register as individuals or in groups, but be processed as individuals.

The group registration feature captures each group member's individual registration data, and associates it with the specified group.

Although the system allows the option to register as a group, the system counts each attendee within the group as one registrant. This ensures accurate attendee counts, regardless of how many groups register. A "cart pay" feature allows members of the same group to submit one single form of payment.

(c) **DCDS Requirement** Provide group, complimentary and/or discounted registration rates online.

- (i) Group registration functionality must be available.
- (ii) Ability to process different fees for (8) attendee types.
- (iii) Ability to select CE courses – a' la carte pricing.

BUZZ Response

The BUZZ registration platform meets all of these requirements. See the previous Section 3.1(b) and the explanation below.

Each registration website (that is, the dedicated website for attendees and the dedicated website for exhibitors) will consist of high-level registration paths and attendee tracks, based on attendee/exhibitor type. The registration software identifies the attendee/exhibitor type, **and using conditional logic**, displays different registration questions, participation questions, purchase packages (including separately priced CE courses) and fees, and other options relevant to each attendee type.

The back-end construction of registration platform, using conditional logic and a series of rules, will ensure that the proper information and purchase packages are made available only to the appropriate registration types.

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Home Agenda Contact Information Register

We look forward to seeing you in Miami, Florida. Please click on the tabs above to review additional program details prior to submitting your registration.

If you have any questions or difficulties registering please do not hesitate to contact Kristen Zacharkan at kzacharkan@globalplanners.com or 800-273-7319.

National Specialist Meeting

* Required Field

Personal Information

Email Business *

First name as it would appear on your badge *

Last name as it would appear on your badge *

Name suffix as it would appear on your badge

Office Address *

City *

State *

Zip *

Work Phone *

Mobile Phone

Please select the firm you are representing: *

Please list any allergies, dietary restrictions or physical needs:

Attendee Registration Website Screenshot

Special for Exhibitors After receiving the exhibitor's sponsorship level and company contact information, BUZZ will enter the exhibitor's information into the software and if DCDS desires to limit the number of exhibitor representatives that can attend the Annual Meeting, the system will generate a unique discount code applicable to that exhibitor. BUZZ will then send this information to the exhibitor, along with an invitation to register their representatives for the program.

When registration is completed, the system will send confirmation emails to each exhibitor-registered attendee. The set-up for this system allows for a real-time count of registrants.

If DCDS desires to limit the number of exhibitor representatives that can attend the Annual Meeting, and discount codes are issued, the discount code for each exhibitor will have a pre-set capacity based on the number of complimentary registrations associated with the sponsorship package, as demonstrated by the software screenshot below. Any number of allocated discount codes can be used at the same time, so that representatives can register additional attendees at a later date. This feature allows the exhibitor to use all or some of their registration codes during a bulk registration.

On the exhibitor's website, exhibitors will have access to event information and details before proceeding to actual registration. Once at the registration platform, they will be able to register any number of



BUZZREGISTRATION

attendees. The discount code, which is included in the invitation, can be used to waive the fee for complimentary registrants. If the exhibitor wants to register more than the allocated number of complimentary registrants, the cart pay feature will calculate the balance remaining after the discount codes have been applied.

Step 1: Enter the Discount Code Details

Discount Name:	Cvent Employee Discount	Active:	☒ Yes ☐ No
Discount Code:	BlueRA50x	Stackable:	☒ Yes ☐ No ?
Discount Type:	By Amount ?	Amount/Percentage:	15.00
Effective From:	?	Effective To:	?
Internal Note:			
Auto Apply:	☐ Yes ☒ No ?	Capacity Type:	Individual ?
Applies To:	Invitee Only	Capacity:	50
		Used:	0
Apply Discount Code: ☒ To specific products ☐ To final total ?			

Discount Code Screen Shot for Registering Exhibitors

- (d) **DCDS Requirement** DCDS to provide excel list of invitees; list to be downloaded from current membership database.
- BUZZ Response** BUZZ will integrate the Society's invitee list into BUZZ's electronic platform, and will send out invitations to the Annual Meeting.
- Based on the information imported from the Society's invitation list, BUZZ will pre-populate answers to specific registration questions. These answers will enable BUZZ to distribute customized invitations that contain a unique URL for each invited guest. The URL will, in turn, enable the recipient to register.
- The registration website will also provide a non-unique public registration link that DCDS may publish and distribute as desired.
- (e) **DCDS Requirement** Provide registration reminders throughout process.
- BUZZ Response** BUZZ will satisfy this requirement by building automated reminders into the system. All attendees will be regularly reminded so that they can make timely travel and lodging plans. Regular reminders also help build anticipation and excitement about the Annual Meeting.
- (f) **DCDS Requirement** Provide automatic tailored confirmation of registration. Also make available by fax or mail.
- (i) Must have ability to change, edit registration on-line after confirmed.



BUZZ REGISTRATION

	BUZZ Response	The system will be set to automatically send confirmation emails to each attendee (including each exhibitor-registered attendee) as his or her registration is completed—and whether they register pre-meeting or on-site. Confirmations can also be sent via fax or regular mail. These confirmations—and payment receipts—can be tailored based on the information collected during the registration process. This allows BUZZ to acknowledge, for example, the application of a special discount code, or confirm that a registrant is associated with a particular group. The system also has the capability to (1) change and edit registrations online and (2) generate duplicate proof-of-payment/registration as needed.
(g)	DCDS Requirement	Provide dedicated customer service via phone and email to DCDS customers; work with DCDS's Customer Service Team to resolve any escalated customer inquiries.
	BUZZ Response	BUZZ Registration provides complete registration services. This means BUZZ serves as an information center and point of contact for attendees and exhibitors, including comprehensive customer service. BUZZ responds to pre-meeting customer inquiries within two hours. COMMITMENT TO CUSTOMER SERVICE BUZZ serves as the information center and point of contact for attendees. <i>BUZZ responds to attendee inquiries within two hours.</i> This commitment includes: • Full communication, coordination and collaboration with DCDS's Customer Service Team. • Email support. • Toll-free telephone support for attendees and exhibitors. A BUZZ Registration staff member answers our toll-free line 9am–8pm EDT. <i>BUZZ does not use an answering service or a third-party call center.</i>
(h)	DCDS Requirement	Accept the following methods of payment: all major credit cards (Master Card, Visa, American Express, and Discover) with secure credit card site.
	BUZZ Response	BUZZ integrates its registration platform with its Authorize.net gateway, and with its Bank of America merchant account. This secure configuration accepts payments via Master Card, Visa, American Express, and Discover. BUZZ will work out a schedule with DCDS for remitting credit card revenue. Reconciliation of credit card payments is a manual process generally done every 30 days, which means that a check would be remitted to DCDS about every 45 days.



BUZZ REGISTRATION

- | | | |
|-----|-------------------------|---|
| (i) | DCDS Requirement | Outline any fees charged by credit card companies for use of point-of-sale machine. |
| | BUZZ Response | Merchant reports are received by BUZZ monthly. As noted in the previous section, Buzz will manually reconcile all credit card reports and will provide a summary and reimbursement to DCDS about every 45 days. |
| (j) | DCDS Requirement | Provide various standard reports as needed (i.e. financial, exhibitor lists, etc.). |
| | BUZZ Response | <p>BUZZ will satisfy this requirement.</p> <p>BUZZ will work closely with DCDS to understand and meet all data reporting needs and timelines, and to produce reporting templates as requested or required.</p> <p>The BUZZ registration platform will also enable DCDS to access all data and create its own reports; see Section 3.3(c) below.</p> |
| (k) | DCDS Requirement | Provide custom reports as requested (i.e. demonstrating the various segments and demographics). |
| | BUZZ Response | <p>BUZZ will satisfy this requirement.</p> <p>The BUZZ registration platform can produce custom reports.</p> <p>The BUZZ registration platform will also enable DCDS to access all data and create its own reports; see Section 3.3(c) below.</p> |
| (l) | DCDS Requirement | Explain your deposit process. |
| | BUZZ Response | <p>At the signing of a contract with BUZZ for this engagement, our fees would be payable as follows:</p> <ul style="list-style-type: none">– A good faith deposit of 25% is required to retain our services and book all scanning and technology devices.– Another 25% deposit is due six months before the Annual Meeting.– Another 25% deposit is due 60 days before the Annual Meeting.– The balance is due 30 days after completion. |
| (m) | DCDS Requirement | Process refunds as determined by DCDS set policies. |
| | BUZZ Response | BUZZ will process refunds according to DCDS policies and instructions. |
| (n) | DCDS Requirement | Provide exhibitor registration option once exhibitor applications have been approved by DCDS; DCDS to provide exhibitor contact to email registration link. |
| | BUZZ Response | BUZZ will process all exhibitor registrations and coordinate closely with DCDS. DCDS has the option to retain the manual registration function as described in Section 3.1(b) above. |



BUZZREGISTRATION

As described in Section 3.1(b) above, exhibitors may register online, or via fax, mail, or phone. For fax, mail, and phone registrations, BUZZ will manually enter the exhibitor's registration data into the system.

In any case, once DCDS has approved an exhibitor's application, BUZZ will acknowledge the approval via email (or by fax or mail, if that is the exhibitor's desired option) to the exhibitor's identified contact person and provide a registration form or link to the exhibitor registration website.

(o) **DCDS Requirement**

Lead retrieval services for exhibitors.

BUZZ Response

Exhibitors may purchase a lead retrieval license for [REDACTED], which enables them to download the lead retrieval application to a mobile device.¹ Using this application during the event, exhibitors may scan the QR code of booth visitors and conference attendees with whom they make contact. Following the event, licensed exhibitors may use the application to access to a secure website where they can download the encoded contact information for each attendee QR code they scanned during the NCDM. The information on each lead will remain available for 30 days following the event.



Lead Retrieval via Smart Phone App

Revenue Sharing

BUZZ will provide DCDS with a revenue sharing payment of [REDACTED] per exhibitor license. We will provide a complete accounting of all exhibitor licenses purchased for this event. The revenue share will be applied as a credit to our final bill to the DCDS, reducing the cost of our service. For example, if 100 exhibitors purchase a lead retrieval license, DCDS will receive a \$[REDACTED] credit on our final bill.

REVENUE SHARING WITH DCDS FOR LEADS

DCDS will receive \$35 for each lead license purchased by exhibitors.

This approach to lead retrieval is benefits everyone. The exhibitors will appreciate the low cost of lead retrieval, and also saving the time and effort required to collect and perform data entry on each lead following the show. Further, the information provided in the QR code will appear in text form just as it was entered the time of registration. No additional data entry on the part of the exhibitor is required. DCDS also benefits by sharing in the revenue associated with lead generation that occurred as the result of the Annual Meeting.

¹ This assumes the availability of on-site Wi-Fi Internet, and that the mobile device is a smart phone.



- (p) **DCDS Requirement** Produce customized badges/tickets with DCDS and/or show logo.
- (i) Customization based on DCDS data needs.
 - (ii) Offer 2 solutions:
 1. Provide pre-show badge/ticket mass mailings with custom confirmation letter on schedule set by DCDS (confirming CE course selection).
 2. On-site badge printing and scanning for session tracking
 - a. 25 rooms utilized for sessions.
 - b. Varying session sizes – 25 people up to 300+.

BUZZ Response Tickets will be customized to include DCDS and/or NCDM logo. BUZZ will also order and obtain badge lanyards.

Manual Ticketing For all pre-registered attendees, BUZZ will print and stuff envelopes with name badges and credentials, together with a customized confirmation letter (which would also confirm CE course selections.) Envelopes would either be mass-mailed according to a schedule specified by DCDS, or sent to the meeting site. Under the latter option, attendees would receive their credentials at check-in. This helps avoid the problem of missing or lost credentials, and helps ensure that all attendees are properly credentialed on arrival.

E-ticketing/QR Code In the past, meeting attendees would receive separate paper tickets for general admission and for each session in the package they purchased—a stack of paper tickets.

Now, once registration data is captured in BUZZ's registration database—either through manual registration and subsequent data entry or online registration—BUZZ's proprietary software generates a unique Quick Response Code (QR code) that will appear on the attendee's name badge. The name badge will be the only ticket that attendee needs for the entire Annual Meeting.



Each attendee will receive a single badge/ticket that will contain a unique QR code. Printing or mass-mailing multiple tickets is no longer necessary.

The QR code on each attendee's name badge links directly to that attendee's unique registration information and includes imbedded information about that attendee, attendee type, and the sessions and events for which that attendee has registered. The appropriate information will be retrieved when the badge is scanned.



Furthermore, information captured in the QR code can be customized according to DCDS needs, and might include, for example, the attendee's name, company name, title, address, email address and phone number.

Pre-registered attendees can print their own name badges. Thus BUZZ in effect offers e-ticketing through the scannable QR code on the attendee's badge.

BUZZ's system also permits on-site additions and changes.

QR Code Scanning

The BUZZ team uses a special mobile application that allows smart phones and iPads to scan name badges and retrieve all data stored in the QR code from the registration.

The QR code thus enables (1) access control for each session, (2) lead retrieval for exhibitors, and (3) rapid reporting of post-meeting metrics.

For session control, BUZZ's software builds in "red light/green light" messaging. If attendees try to check into an event they did not pre-register and pay for, the scanning device will send a friendly note indicating that they are not registered to attend that particular session. BUZZ's uniformed staff—which will be posted outside each session—can offer to assist them with editing their attendee type, update their registration, adjust pricing if necessary, or direct them to the session(s) for which they are registered.

3.2 On-Site Registration Requirements and Responses

- | | | |
|-----|-------------------------|---|
| (a) | DCDS Requirement | Approximately 40% of attendees register on-site. |
| | BUZZ Response | On-site registration, management, and support is a standard component of BUZZ's services.

BUZZ will have sufficient on-site staff and technology capability to easily accommodate any number of on-site registrations—even thousands of them. This includes on-site ticketing and credentialing with the QR code capability described above. |
| (b) | DCDS Requirement | Provide management of the on-site registration for attendees, exhibitors, volunteers, speakers, and VIPS, selling event tickets, including any necessary reports, etc. |
| | BUZZ Response | BUZZ has developed a reputation for providing exceptional, personalized service to each of our clients. On on-site staffing is carefully planned to ensure that all attendees receive the highest quality service at all times. To that end, on-site event personnel from BUZZ will be available and easily identifiable to all attendees at all times during the Annual Meeting. |



BUZZ REGISTRATION

BUZZ personnel will use technology to augment its on-site service. For the Annual Meeting, BUZZ will deploy PC laptops at based self-service registration kiosks. iPads will be used at the scanning/coding stations, which can be located centrally at registration, as well as outside of each breakout session location.

This user-friendly self-service registration capability will enable attendees to select their registration options, pay using a secure wireless network connection and print their name badges with scannable credentials.

After completing the registration process, attendees will collect their printed credentials from a central station staffed by BUZZ Registration on-site personnel.



On-site Self-service iPad Kiosk

Lost Badge?

Attendees will be able to print or reprint their guest credentials at any time during the Annual Meeting, simply by visiting the central meeting check-in/registration station.

(c) **DCDS Requirement**

Outline plan for onsite registration personnel including schedule, training and costs.

BUZZ Response

BUZZ will work closely with DCDS to determine the appropriate and precise staffing levels required to provide our signature service to all guests during the event, and to ensure that registration services for the Annual Meeting—including all of its breakout sessions—are never unstaffed or understaffed.

BUZZ executive staff is always present on-site to supervise the delivery of event services. The BUZZ Registration senior-level personnel who will be working the Annual Meeting are listed in the table below.

SEE TABLE ON NEXT PAGE.

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BUZZ REGISTRATION

Name/Title	Responsibility	Years of Experience	Supervisor?
Megan Buzzetta President/ Owner	Oversee all on-site operations and manage client needs and expectations.	20 years	☒ Yes ☐ No
██████████ Owner	Manage on-site staff and coordinate staff schedules.	15 years	☒ Yes ☐ No
██████████ Global Administrator	Coordinate and manage all programming of scanning and lead retrieval data.	2 years	☒ Yes ☐ No
██████████ Director of Technology	Coordinate and manage all equipment and hardware.	12 years	☐ Yes ☒ No
██████████ Director of Registration	Manage all pre-registration activity and ensure quality control for all registration services and deliverables.	10 years	☒ Yes ☐ No

Based on the information provided in the RFP and otherwise available to us, we initially recommend the following:

People Power

- Total on-site staff of 33, consisting of 5 BUZZ senior personnel (identified in the above table) and 28 BUZZ independent contractors/Convention Center employees (with the precise balance to be discussed). To ensure that all breakout sessions are appropriately staffed, a staff member would be stationed outside each session.

BUZZ supplements its employee staff with independent event staff personnel to provide on-site event management. BUZZ has a national network of more than 60 thoroughly trained and experienced on-site event staff personnel who are fully familiar with GPI/BUZZ policies and practices, and who have demonstrated superior event management and service skills.

The costs of independent staff and Convention Center employees would be passed through to NCDM without mark-up.

BUZZ will train, supervise, and manage all independent event staff and all Convention Center employees that work the NCDM.

Technology

- A central registration station with 22 PCs and 9 printers for pre-registered attendees, manned by 18 staff personnel.
- A self-service kiosk outside each breakout session.

- (d) **DCDS Requirement** Describe options for self-registration to include ticket/badge pick up.



BUZZ REGISTRATION

	BUZZ Response	See Section 3.2(b) above for self-service capability. This capability will be available for on-site registration as well as check-in for pre-registered attendees check-in.
(e)		This section was intentionally deleted prior to submission – not applicable.
(f)		This section was intentionally deleted prior to submission – not applicable.
(g)	DCDS Requirement	Collect registration payments.
	BUZZ Response	BUZZ’s comprehensive suite of registration services, and its registration technology platform, includes payment processing and various bill-pay options. The BUZZ software platform also has the capability to create or add non-traditional or non-standard payment types (for example, internal payment coding, payments to be billed coding). Paying attendees will be able to choose to pay via credit card, debit card, or by invoice. – BUZZ will process credit and debit card payments either electronically as described in Section 3.1(h) above or manually. – If attendees choose to be invoiced, their registration status will be flagged as "pending" until their BUZZ Registration specialist updates their registration. Our registration platform will provide tracking information for all types of payments, including standard and non-standard payments. The collected information will include the billed entity, the amount due and any relevant billing codes. We can also provide tracking information for payments that must be billed outside of the standard registration process, and for non-standard payments that are in process.
(h)	DCDS Requirement	Provide proper documentation for annual audits.
	BUZZ Response	BUZZ will provide annual audit information and documentation of the type, and in the format, required by DCDS.
(i)	DCDS Requirement	Accept the following methods of payment: all major credit cards (Master Card, Visa, American Express and Discover) with secure credit card site.
	BUZZ Response	BUZZ will satisfy this requirement as described in Section 3.1(h) above.
(j)	DCDS Requirement	Provide lead retrieval services for exhibitors.
	BUZZ Response	BUZZ will provide lead retrieval, and revenue sharing with DCDS, as described in Section 3.1(o) above.



3.3 Web Requirements and Responses

- (a) **DCDS Requirement** Develop convention website utilizing web address <http://thencdm.com/>.

(i) Include following information/tabs/pages:

1. Home
2. About
3. Education
4. Exhibitors
5. Local Info
6. Register Online

(ii) Graphics to be provided by DCDS.

BUZZ Response

BUZZ will develop and customize the NCDM website according to DCDS specifications.

BUZZ understands that DCDS expects to finalize its specifications such that BUZZ would receive them by about October 1, 2013, and recognizes that DCDS anticipates a mid-November launch date for the NCDM website.

- (b) **DCDS Requirement** Develop a registration online portal to include current organization look and feel.

(i) To include registration for exhibitors, volunteers, speakers, and VIPs, etc.

BUZZ Response

BUZZ will satisfy this requirement as described in Sections 3.1(b) and 3.1(c) above.

- (c) **DCDS Requirement** Provide access to on-line reports for the following:

(i) Real time reports (alpha, numeric) to include but not limited to, registration category, state, role, etc.

(ii) Event and workshop reports.

(iii) Segment and demographic report.

BUZZ Response

The BUZZ Registration platform will make real-time, online data available to DCDS on demand² via a user-friendly back office interface that gives DCDS quick and easy access and reporting capability.

The above-listed data types will be readily accommodated.

FULL-TIME, REAL-TIME REPORTING

Authorized DCDS users will have real-time access to all registration data and can create customized reports as desired.

BUZZ will provide training to DCDS administrative personnel on how to access real-time data and create reports.

² Real-time reporting capability on-site assumes the availability of on-site Wi-Fi Internet connectivity. In the absence of on-site Wi-Fi service, the registration platform can still collect registration data, but the data collected on-site must be uploaded to the software cloud before it can report updated information.



The platform's reporting capability includes customized reports that can be created prior to the Annual Meeting or created on site, in real time.

BUZZ will work closely with DCDS to understand and meet all data reporting needs, and to produce appropriate report templates as requested or required.

BUZZ's registration platform also provides exportable data in standard data formats, including those recognized by Microsoft Office. The reporting tool can also produce reports in PDF format.

BUZZ will provide training to DCDS administrative personnel on how to access real-time data and create reports.

(d) **DCDS Requirement**

Hotel Reservations:

- (i) Provide on-line information for hotel reservations – attendees to book on own.
- (ii) Optional – provide on-line information for hotel reservations method as part of on-line registration.
 - 1. Coordinate reservations with designated hotel and manage the confirmation process.
 - 2. Handle special group block room reservations for VIPs.

BUZZ Response

As part of BUZZ's registration services, we offer toll-free registration support for attendees and exhibitors.

If Attendees Book

If attendees book hotels on their own, BUZZ staff will still be available to answer basic questions, such as hotel availability, group discounts, etc.

If BUZZ Coordinates

DCDS may elect to have BUZZ provide, as part of its on-line registration system, information and guidance relating to hotel reservations. As part of this optional service, BUZZ will (1) coordinate reservations with the designated hotels and manage the confirmation process, (2) handle special group block room reservations for VIPs, and (3) work directly with the hotel(s) on room list(s).

Having BUZZ perform this service adds value over attendees booking on their own. BUZZ will effectively manage entire room blocks to hit contracted room nights, reaching desired numbers to earn comp nights and/or utilize attrition.

3.4 Equipment Requirements and Responses

- (a) **DCDS Requirement** Provide necessary hardware and software for onsite registration area.

BUZZ Response

BUZZ will satisfy this requirement as described in Section 3.2(c) above.

- (b) **DCDS Requirement** Provide lead retrieval hardware and software for exhibitors.

BUZZ Response

BUZZ will satisfy this requirement as described in Sections 3.1(o) and (p) above.



- (c) **DCDS Requirement** Provide scanning hardware and software for badge production and session tracking.

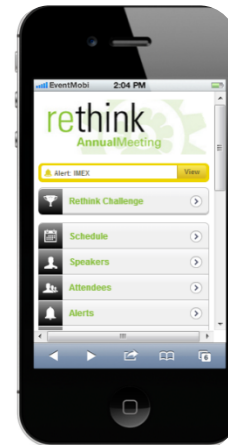
BUZZ Response BUZZ will satisfy this requirement as described in Sections 3.1(p) and 3.2(b) above.

3.5 *Mobile App Requirements and Responses*

- (a) **DCDS Requirement** Provide details about mobile app capabilities/partners.

BUZZ Response We understand that DCDS used EventMobi for its mobile app for the 2013 Annual Meeting, and was pleased with the result.

BUZZ also partners with Event Mobi for its mobile app needs, and would do so for the 2014 Annual Meeting. The mobile app capability for this event will be equally robust as 2013 version, and the features will be comparable.



**EventMobi Screenshot:
Association Annual Meeting**

3.6 *Post-Conference Requirements and Responses*

- (a) **DCDS Requirement** Provide regularly scheduled reports to include various attendances counts and reports (i.e. counts by state, by category, by role, etc.).

BUZZ Response BUZZ will satisfy this requirement as directed by DCDS. For more detail on reporting, see Sections 3.1(j) and (k), and Section 3.3(c), above.

- (b) **DCDS Requirement** Provide final statements outlining all financial transactions.

BUZZ Response BUZZ will satisfy this requirement through its accounting staff, as directed by DCDS. Final accounting will include total DCDS revenue sharing in exhibitor leads as described in Section 3.1(o) above.

- (c) **DCDS Requirement** Provide final registration data export.

BUZZ Response BUZZ will satisfy this requirement as directed by DCDS. For more detail on reporting, see Sections 3.1(j) and (k), and Section 3.3(c), above.

3.7 *Other Requirements, Requests, and Responses*

- (a) **DCDS Requirement** DCDS seeks proposals that will demonstrate past performance conducting work for similar sized events.

BUZZ Response As previously indicated in Section 2.3 above:

- GPI/BUZZ has a demonstrable track record, handling literally hundreds of registrations for more than 3,000 meetings.



BUZZ REGISTRATION

- Since BUZZ's formal launch as a GPI division in 2010, BUZZ has provided professional comprehensive or a la carte event planning services for more than 100 events.

GPI/BUZZ has also provided registration services for similar-sized events. For example:³

- Minneapolis – all-female, private association. Attendance: 4,000
- Orlando – a variety of associations. Attendance: 10,000+
- 2013 Mobile World Congress. Attendance: 7,000
- Legg Mason Road Show. Attendance: 5,500.
- Top Financial Managed Assets Training Symposium – 7,000 registrations launched simultaneously for meetings that took place in waves of three.
- The Patent Information Users Group (PIUG). Attendance: 200-300.
- The Healthcare Information Users Group (HIUG). Attendance: 400
- Cobb County, GA – Christian Music convention. Attendance: 200

BUZZ is also in negotiations for the following engagements:

- Dairy Queen. Estimated attendance: 3,000
- National Cattle Beef Association. Estimated attendance: 7,000
- California Association for Bilingual Education (CABE): Estimated attendance: 4,000
- Boston Scientific: Estimated attendance: 1,600+

Testimonials

A sampling of client testimonials is contained in Section 2.3.2 above, and a more complete sampling, with recommendation letters, is attached as Exhibit 2.3.2.

References

See below.

REFERENCES BEGIN ON NEXT PAGE.

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³ Some clients are not identified by name because of confidentiality/non-disclosure constraints.



BUZZREGISTRATION

Reference #1	
Event Name	[REDACTED] Advanced Education Symposium
Event Start Date	[REDACTED]
Event End Date	[REDACTED]
Event Type	Financial Services Educational
Event Host	[REDACTED]
Contact Name	[REDACTED]
Job Title	Director, Business Development Global Wealth & Retirement Solutions
Employer	[REDACTED]
Contact Telephone Number	[REDACTED]
Contact e-mail Address	[REDACTED]
Type(s) of Service	For over a decade, GPI/BUZZ has been providing similar support services to [REDACTED], providing registration for thousands of registrants at a time, and coordinating the badge scanning and lead retrieval team.

Reference #2	
Event Name	Manufacturing [REDACTED]
Event Start Date	[REDACTED]
Event End Date	[REDACTED]
Event Type	Manufacturing Association Event
Event Host	[REDACTED]
Contact Name	[REDACTED]
Job Title	Client Relations Coordinator
Employer	[REDACTED]
Contact Telephone Number	[REDACTED]
Contact e-mail Address	[REDACTED]
Type(s) of Service	BUZZ provided website creation and full-service registration management services – invitation launch, registration processing with multiple codes; payment processing and call center.



BUZZREGISTRATION

Reference #3	
Event Name	Medical Advisory Board Meeting [REDACTED]
Event Start Date	[REDACTED]
Event End Date	[REDACTED]
Event Type	Life Sciences Educational
Event Host	[REDACTED]
Contact Name	[REDACTED]
Job Title	Manager, Meetings & Events
Employer	[REDACTED]
Contact Telephone Number	[REDACTED]
Contact e-mail Address	[REDACTED]
Type(s) of Service	BUZZ has provided full registration management services to [REDACTED] for several years.

Additional Reference



For the past [REDACTED] years, we have supported [REDACTED] on various size and scope events, both in his current role at [REDACTED] Life Insurance, and in his previous role at [REDACTED].

- (b) **DCDS Requirement** The successful vendor will have demonstrated experience in working with not-for-profit associations.
- BUZZ Response** The client table below reflects ample experience in the not-for-profit sphere.

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BUZZ REGISTRATION

Client	Industry	Not-for-profit = X
MPI	Association	X
Autism and Asperger Association	Association	X
Manufacturing Matters	Association	X
Mercer County Park	County	X
Bridgepoint Education	Educational	X
UC San Diego	Educational	X
Be-a-Match	Health	X
CNBC	Entertainment	
Bank of America	Financial	
Legg Mason	Financial	
AXA	Financial	
Allianz	Financial	
Athene Annuity	Financial	
Lincoln Financial	Financial	
Guggenheim Investments	Financial	
Novo Nordisk	Pharmaceutical	
Boston Scientific	Pharmaceutical	
Genoptix	Pharmaceutical	
Majesco Mastek	Technology	
Nokia	Technology	
UC Strategies	Technology	
Fuse Events	Hospitality	
IBIS	Sales	

(c) **DCDS Request**

Vendors should include current practices, policies, and procedures. As well as a copy of a customer service philosophy or policy currently in place.

BUZZ Response

BUZZ's current practices, policies, and procedures, as they relate to this engagement, are reflected throughout this proposal.

The core tenets of BUZZ'S customer-centered service philosophy are stated in the text boxes on page 7 and page 14, and are also reflected throughout this proposal.

(d) **DCDS Request**

The vendor should acknowledge that if they are awarded the contract, they will:

- (a) Function as an independent contractor in the conduct of this project and assume full responsibility for all actions, damages, injuries, etc.



(b) At all times, comply with all laws, rules, and regulations of relevant jurisdictions.

BUZZ Response

BUZZ acknowledges that it will function as an independent contractor, will comply with applicable law, and will be liable for the acts and omissions of its employees and staff relating to this project.

To back this promise, GPI/BUZZ carries, and will keep in force, the insurance coverage described in [Exhibit 3.7\(d\)](#).

3.8 Additional Considerations

3.8.1 BUZZ Registration proposes to provide complete, customized registration services to DCDS. As a part of this comprehensive array, BUZZ will provide:

- Unlimited training for, coordination with, and support for DCDS—as and when needed.
- All software upgrades, updates, and patches.

3.8.2 For onsite equipment storage, BUZZ will require locked storage space sufficient to store approximately 25 computers and 10 printers. Payment terms are negotiable.

3.8.3 ***BUZZ will provide such additional information, including banking references and standard services contract, as DCDS may request.***

Section 4. Timeline and Cost

4.1 Implementation

Buzz's proposed timeline for the services described in this proposal is attached as [Exhibit 4.1](#).

4.2 Pricing

4.2.1 Price Grid

BUZZ's pricing grid for the array of bundled and a la carte services described in this proposal is attached as [Exhibit 4.2](#).

4.2.2 The Business Case

BUZZ recognizes that engaging BUZZ for some or all of the services described in this proposal will have a price tag for DCDS.

However, there is a compelling business case for making an investment in BUZZ. Hiring BUZZ will, for example:

- Align with the Society's states strategic goals to enhance and expand Annual Meetings.
- Increase efficiency and resource allocation for DCDS—DCDS staff can concentrate on the substance of the NCDM.
- Save postage and stationery.
- Reduce labor costs for Convention Center employees.
- Create a revenue share—and a new revenue stream—for DCDS.



BUZZ believes that this engagement can be negotiated and structured to become nearly revenue neutral to DCDS. And if not, any incremental cost can be passed through to exhibitors—or if DCDS sees fit, attendees. For example, a modest \$25 fee increase for exhibitors would equate to about \$3,750; a \$5 increase for breakout sessions would equate to about \$10,000; a \$5 increase in the general attendance fee would equate to about \$15,000.

Section 5. Key Takeaways and Conclusions

Sections 1 and 2

- The Society's current registration protocol for Annual Meetings is extremely detail heavy, time-consuming, and imposes considerable data-gathering, scheduling, administrative, and management burdens on DCDS human resources. Many elements of the current protocol are handled manually.
- BUZZ Registration has identified numerous opportunities for lightening the Society's meeting registration and on-site management burdens—or eliminating them entirely—by extending the DCDS team with BUZZ's outsource capabilities.
- BUZZ's capabilities deliver an unparalleled combination of people power and technology.
- BUZZ Registration has the demonstrated expertise, resources, personnel, and bandwidth to partner with DCDS.

Section 3

- BUZZ represents a one-stop, "plug and play" resource for (a) delivering the solutions described in Section 1 of this proposal and (b) fully satisfying the stated requirements of this project.
- These solutions—whether adopted by DCDS as an end-to-end or a la carte arrangement—are easy for DCDS to initiate and easy for DCDS to oversee.
- The comprehensive array of services and options offered by BUZZ align with DCDS's strategic, business, professional, educational, functional, and technical objectives and needs.

Section 4

- Engaging BUZZ to handle some or all of the registration and on-site management functions for the Annual Meeting makes business sense and is economically supportable.



EXHIBIT 2.1 GPI Capabilities



Global Planners, Inc. is a full-service corporate event planning company—a direct end-to-end vendor. GPI's services include:

- Site selection
 - Analysis/recommendations
 - End-to-end event flow/component diagramming
- Meeting/event planning
 - Cost analysis/monitoring
 - Speakers/business sessions
 - Theme, content, and presentation development
 - Custom meeting materials/décor/signs
 - Unique food/beverage options
 - Entertainment
 - VIP experience/amenities
 - Post-event billing/reporting
- Registration management
 - Invitations/responses
 - Liaison with site and attendees
- 24/7 on-site event management through GPI's signature "Red Shirts" team
 - "Red Shirts" greet attendees at site/at airport
 - Registration services
 - Hospitality/registration desk – personal concierge for attendees
 - Pre-/post-conference extensions, meals and activities
 - Business center needs
 - Laundry services
 - Guide/direct attendees to meals and functions
 - Meals/function staging – set-up and staffing, dinner table arrangements, special dietary needs
 - Business sessions/breakouts
 - Set up/re-set rooms
 - Monitor food/beverage break stations
 - Activities
 - Materials management – storage space, check-in shipments, organizing, collating, distributing, ship-out
 - Office management – setup, security, staffing, organization, clean-up
 - Inspecting signage, placement, hotel postings
 - Paying hotel staff gratuities

**EXHIBIT 2.3.2****Customer Reviews and Recommendation Letters**

I wanted to take a moment to thank and recognize each of you for your work to deliver this week's Merrill Lynch Market Investment Invitational in New York. The feedback from the Financial Advisors regarding the impact and quality of the meeting far exceeded our expectations.

Each of your commitment, professionalism and attention to detail during both the planning and delivery of the meeting continues to amaze and impress both those that helped organized and those that attended the meeting. Additionally, you and your entire team are a pleasure to work with.

I equate the individuals within your organization to the Secret Service. While the meetings are moving along as planned, you are there in the background shepherding the proceedings along. However, once there is a participant, presenter or sponsor in need, you are there in a moment's notice ready to go above and beyond to meet their needs.

I am grateful to have you as partners and look forward to working with you on many future successful meetings.

Sincerely,

[REDACTED]

Just wanted to thank you for arranging that UNBELIEVABLE evening for our team last night. That was truly an unforgettable night and I'm so appreciative for all that you did to make it happen.

Thanks as well to you and your team for a flawless AES meeting.

[REDACTED]

Thanks for all of your help yesterday with the institutional conference. We've received great feedback from attendees that the conference was informative and worthwhile. I look forward to working with all of you again on our next event.

Many thanks again for all that you did to help make the institutional event a success.

[REDACTED]

I wanted to thank you for all of your help planning the specialists meeting. It would be impossible to put these meetings together without you. I hope you know how much your hard work is appreciated. All of the attention to detail and follow-up is amazing. I know this is going to be a great meeting, maybe our best one yet so I wanted to make sure to let you know how grateful I am for your help.

Thanks for everything!

[REDACTED]



BUZZ REGISTRATION

All,

After each Symposium I try to send a note to acknowledge your hard work and resulting success that we all enjoy by association. And this one, with a host of additional interested parties, posed even greater challenges than other meetings.

I'm all out of fresh ways to say—you rock. Thanks for making us all look good.

[REDACTED]

Just wanted to thank you for all of your efforts and expertise for the wonderful trip into NY.

The team at the hotel was handed quite a challenge with the closing of some of the airlines with the heat. Your team went into action and handled it very well.

Thank you again for all of your efforts.

Respectfully,

[REDACTED]

Just wanted to thank you for all of your help on the Arizona trip. You and your team did an excellent and extremely professional job. You got it done, and handled all of the last minute requests and hiccups with a smile, which is a lot of work! Congratulations to you and the team for a job well done.

[REDACTED]

You guys did a fantastic job—in fact we had several FAs mention how great “the folks in the red shirts” were at running the show (directions, solving problems, etc.). We look forward to working with you both in the future... thanks again!

[REDACTED]

I just wanted to thank you for your tremendous contributions to the Invitational. Initial feedback has been incredibly positive—with many comparisons to previous years and indications that this meeting far surpassed other meetings.

Thank you for being our partners in this meeting and for the incredible attention to detail. Marybeth and I came in on Saturday in the event there were some last minute logistics that needed our input. We actually felt guilty being there when we realized (rather quickly) that you had everything well under control. Your professionalism and experience were evident throughout every aspect of the meeting.

[REDACTED]

WOW! I just got goose bumps—these are really good numbers for us this far out. Very pleased. Thank you! ...Lots of work on your part—thank you for making this as easy as possible for all of us. ...Thank you so much for all of your hard work! The event has been extremely successful; we greatly appreciate your excellent service.

[REDACTED]



BUZZREGISTRATION

To Whom It May Concern:

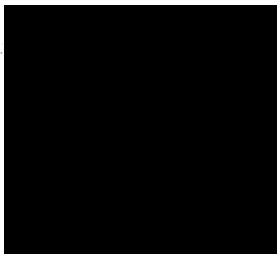
I'm happy to offer perspective on GP/BUZZ and was completely delighted to work with them over the years. Essentially, I outsourced conference and event planning to GP and retained a single full-time employee to manage the process.

GP/BUZZ is extremely business focused and became aligned with our strategy for conducting meetings. The team is very collaborative and flexible EVEN when we weren't. They take direction and constructive feedback very well.

They were responsible for roughly a half dozen of annual meetings comprised of 600+ attendees, multi nights with complex meeting schedule (i.e. general session + breakouts).

In addition, they would run our smaller market meetings (less than 600 attendees) and these would number 25+ in a given year.

I highly recommend them which, if you knew me, would understand that this type of "rave review" is very rare indeed.





To Whom it May Concern:

I am happy to share my experiences with Global Planners/BuzzRegistration with you. I have worked with the owner, Megan Buzzetta, for many years initially at Merrill Lynch and then when she went out on her own. I feel that what differentiates Megan is a very high level of professionalism coupled with a friendly, high-touch level of service that I have not come across elsewhere.

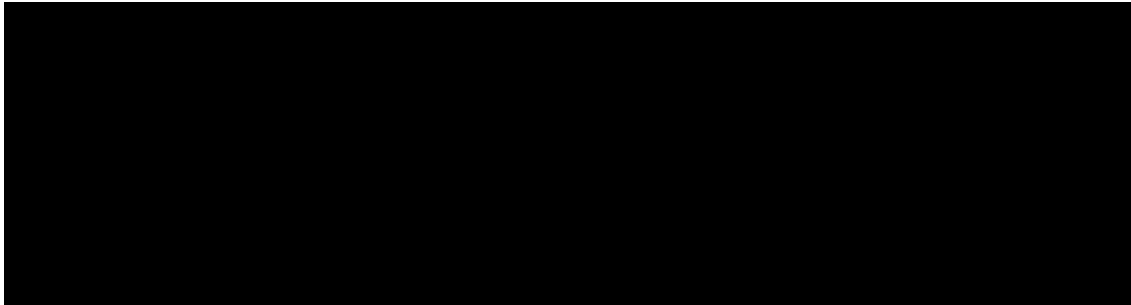
I have worked with several meeting planning organizations in my career and would recommend GP/Buzz over them all.

My initial work with GP was when I was at Merrill Lynch and we did dozens of events around the country, both large (100+ attendees) and small (15-25).

All were delivered with the same quality and warmth, regardless of size and venue. What has been most impressive are the very large meetings they continue to do with Merrill in Orlando, Florida. These are generally 500-700 person meetings with large general sessions and literally dozens of breakout sessions. My work with them in the past gave me insight into the "behind the scenes" activity of these events and it is significant. The varied demands of the financial advisors and the many things that don't go according to plan could throw off a meeting services team. What I have seen is a team that deals with it all in an efficient, friendly and solution-oriented manner which has allowed them to consistently get very high scores on surveys meeting after meeting.

I have recently started working with them again at my current firm after working to remove the prior service provider. They had been here for many years and people were concerned with the change, but it has been received very well and people comment at every event how much better it is now.

I hope this is helpful to you as you consider Global Planners/BuzzRegistration. I cannot recommend them highly enough and I feel they will make any event you choose to use them for a great success.



To Whom It May Concern:

It is with great pleasure that I share my experiences with BUZZRegistration/Global Planners. Since [REDACTED] I have worked with the owner, Megan Buzzetta, initially through my role at [REDACTED] and again [REDACTED]. What continues to make Megan (and her organization) out-shine other event service companies is her passion for excellence and desire to make any meeting an extraordinary experience for our clients.

While I was the Head of Sales for [REDACTED] Global Planners was responsible for planning all of the Annuity Training Symposiums throughout the country. These meetings, as well as others within our organization, totaled approximately 150 planned events annually and ranged in size from 10 to 500 participants. All events were coordinated impeccably and successful. As the business grew, I enthusiastically outsourced more meeting planning and event services to Megan and her team as Global Planners proved to handle every aspect with professionalism and a sense of urgency. The support delivered by this team was unparalleled.

Since leaving [REDACTED], I called upon BUZZRegistration and Global Planners to work with my new team at [REDACTED]. In addition to delivering spectacular event planning services, BUZZRegistration managed the registration aspect of events with meticulous attention to detail. Recently, Megan and her team planned our [REDACTED] Golf Outing and all participants enjoyed a smooth ride throughout the course of the event. Megan and her organization handled all of the *behind-the-scene* requirements and exceeded expectations just as they have for over ten years.

By way of this letter I express my high recommendation of the services provided by Megan and her team at BUZZRegistration and Global Planners.

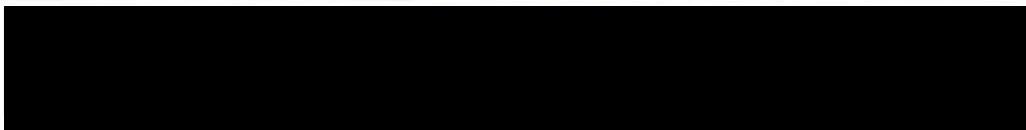
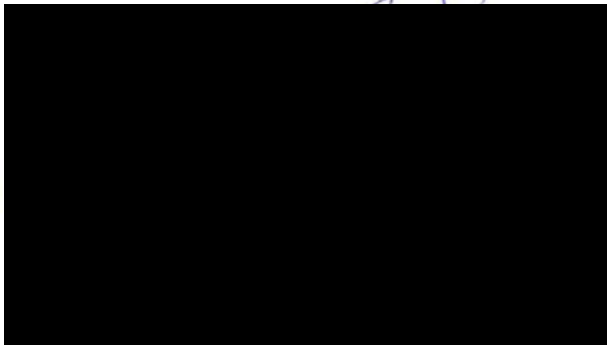




EXHIBIT 3.7(d)

GPI/BUZZ Insurance Coverage

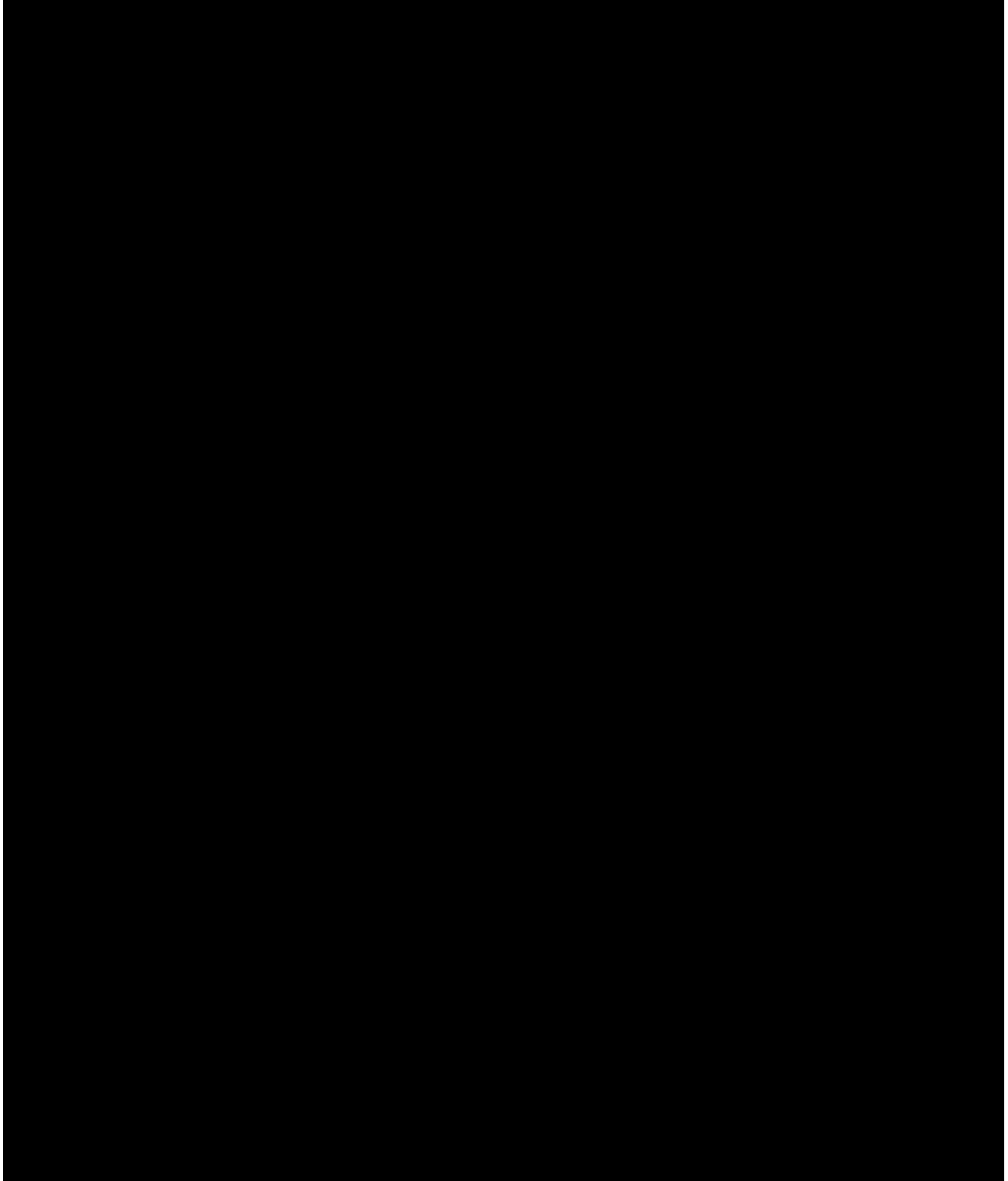




EXHIBIT 4.1 Project Timeline

DELIVERABLES	ANTICIPATED START DATE	DURATION
Pre-Registration Set Up		
Working session with committee and BUZZ to discuss promotional codes, attendee types, and overall direction for site builds.		
DCDS to provide graphics for website design		
DCDS to provide agenda and material for website		
Implement invoice procedure with DCDS		2 Weeks
Create back end of registration sites		3 Weeks
Design and develop DCDS website (http://thencdm.com)		4 Weeks
Design and develop front end of registration site		2 Weeks
Working session to coordinate needs for Event Application with partner EventMobi		
DCDS to provide attendee list for formatting and uploading		
DCDS approval on websites		2 Weeks
BUZZ to make any revisions/adjustments based on DCDS until overall approval		1 Week
Registration and Conference		
Create standard requested parked reports		1 Week
Launch Registration		
Registration reports to DCDS		Bi-Weekly
Coordinate with exhibitors on lead retrieval		Ongoing
Processing of payments and invoicing		Ongoing
Reimbursement to DCDS for credit card revenue		60 Day Cycles
Send registration reminders		Bi-Monthly
Finalized agenda for configuration of breakout sessions to BUZZ		
Session configuration for breakout sessions in cloud based software		2 Weeks
Draft badge layout		2 Weeks
DCDS to approve badge layout		1-2 Weeks
Account for and manage name badge supplies		1 Week
Attendee QR code assignment configuration (as registrations come in)		Ongoing 6 Weeks
Send final confirmation emails to all attendees		
All materials including equipment, signage, badges, lanyards etc. assembled for shipment		1 Week
Configure and distribute log in information for lead retrieval		1 Week
Post Conference		
Provide session tracking information		On-site
All final bills due to BUZZ for reconciliations		3 Weeks
Provide financial statements to outline all transactions		4-6 Weeks
Provide final session tracking information		2-3 Weeks
Provide final attendee information		2 Weeks



EXHIBIT 4.2
Pricing Grid - Based on 3,000 Attendees and Exhibitors

Category	Notes	Unit Price	Unit	Total
REGISTRATION MANAGEMENT				
<u>Registration Website Design</u> Creation and design of online attendee and exhibitor registration sites, ensuring group registration capabilities				
a. Attendee Website				
b. Exhibitor Website				
		TOTAL		
<u>Conference Website Design</u> Creation and design of conference website, to be integrated with registration websites	Rate of [REDACTED]/hour for website development and coding			
		TOTAL		
<u>Online Registration Management (60% of attendees)</u> Comprehensive on-line registration management, with credit card processing, reporting, exhibitor management, and group registration capabilities				
Credit Card Processing Reconciliation Fee	Billed for number of credit card transactions			
		TOTAL		
<u>Manual Registration Management (fax/mail)</u> Comprehensive manual registration management, with credit card processing and reporting	Additional charge of \$[REDACTED] registration for attendees who call, mail, or fax their registration			
		TOTAL		
<u>On-Site Registration Management (40% of attendees)</u> Including electronic check-in and automated name badge printing				
		TOTAL		
HOTEL RESERVATION & ROOMING LIST MANAGEMENT - Optional				
Coordination of reservations with hotel/management of attendee confirmation process	Compensated by hotel commission			
		TOTAL		
SCANNING & LEAD RETRIEVAL				
<u>On-Site Scanning</u>				
BUZZ Cloud-based Software				
PCs (for check-in and onsite registration)				
Badge Printers Onsite				
Furniture - Provided by Client		Included		\$0.00
Signage - Provided by Client		Included		\$0.00
Systems Integration with Cvent				
Wireless Internet - Provided by Client		Included		
		TOTAL		



BUZZREGISTRATION

Category	Notes	Unit Price	Unit	Total
Name Badge Production & Services				
Badge Stock				
Badge Sleeves		Included		\$0.00
Lanyards (generic)		Included		\$0.00
Clips		Included		\$0.00
Badge Printing Setup and Artwork				
Badge Printing: front (4 color)				
Badge Printing: back (4 color)				
		TOTAL		
Session Tracking				
Software Configuration & Set up for Scanning and Name Badge Production				
Onsite Scanners	Based on 25 rooms for scanning, multiple scanners needed for larger sessions (300+) - Could change based on 2014 agenda			
Wireless Data Transfer		Included		\$0.00
		TOTAL		
Lead Retrieval				
Usage Licensing - Charge to apply to exhibitor with \$35.00 in revenue sharing for DCDS per each license				
		TOTAL		
ON-SITE SUPPORT				
Program Manager (# of people/days: 1x4)		Included		\$0.00
Technical Support (# of people/days: 2x4)		Included		\$0.00
Project Manager (# of people/days: 2x4)		Included		\$0.00
Temp Staff (# of people/days: 28x4)	Based on number of sessions, could be higher or lower based on floor plan of convention			
Airfare				
Travel for Temp Staff (100 miles x 30 Staff)				
Hotel (# of people/days: 5x4)				
Meals (Per Diem) (# of people/days: 35x4)				
		TOTAL		
Misc. Expenses				
Shipping - Billed at Actual				
a. Estimated Shipping NJ to DC				
b. Estimated Shipping DC to NJ				
		TOTAL		
TOTAL				