Best Practices for Canceled & Postponed Events

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Introduction

Sometimes, unavoidable circumstances arise and your event can't proceed as planned. When faced with the challenge of canceling or postponing an event, think carefully about how you'll deal with both the current situation and any future replacement event.

This article covers different options and includes checklists and processes you may consider when developing your own cancellation or postponement policy.

> NOTE: These checklists and suggestions offer ideas, but you and your management team should always design processes and communications to fit your specific events or meetings.

To postpone or cancel?

Sometimes you can directly control the decision to postpone or cancel; at other times, circumstances will dictate how you proceed.

Consider the following:

- Can I postpone to a future date and keep my event in the same format and schedule?
- How will a cancellation or postponement affect my cancellation refund policies? [Noting that in general, your cancellation policy refers to what will happen if an attendee cancels, not if you cancel the event.]
- Will my hotel partner be able to work with me on this change in schedule?
- How will I manage credit card and other refunds or credits?

Event Cancellation

Canceling an event involves a series of steps, including:

- Communicating with your attendees
- Reviewing and documenting updates to your Payment and Cancellation policies BEFORE you issue refunds
- Updating your Payment and Cancellation policies in EventsAir – noting you can't change policies retrospectively (e.g. if people have already agreed to a policy that assures a full refund if the event is canceled, and people have paid on that basis, you can't renege on that)
- Bulk canceling all elements of your event in EventsAir
- Issuing refunds as appropriate to your attendees
- Releasing accommodation inventory back to your partner hotels
- Reviewing and canceling all other supplier contracts as appropriate

Your goal here is to end up with a fully canceled event with all funds accounted for.

Communication

You can create pre-written merge docs that can include financial and payment details, and you'll want to prepare and test all communications as soon as you know you're canceling an event.

Documenting your cancellation policies

Ideally, you'll have already defined a Payment and Cancellation policy for all your events. Depending on the reasons for cancellation, you may choose to change or remove your cancellation penalties [i.e. penalties for an attendee canceling]. You should review and document any changes to policies before enacting them, as this is a fairly significant step.

Updating your payment and cancellation policies

Payment and Cancellation Policies can be defined in EventsAir for:

- Registrations
- Functions
- Accommodation
- Travel

For these four categories, you can define payment schedules and cancellation policies to be applied BEFORE anyone actually registers for your event.

Since postponing your event might mean that attendees can no longer take part, you should set these policies BEFORE registrations or honor what was originally specified. You may choose to remove attendee cancellation penalties under these circumstances.

Exhibitions and Sponsorships have payment schedules that can be defined, but cancellation and refunds are handled on a case-by-case basis (depending on what your Terms & Conditions say). You will still want to review your published cancellation and refund policies for these categories as well.

Bulk Cancellation

In Express Actions, you can use the Bulk Cancellation tool to cancel, in bulk, all or part of the registration details in your attendee records.

If you choose ALL, then every cancelable item in EventsAir will be bulk changed to Cancel. This action will effectively cancel your entire event, once every attendee (for all registration types) has been bulk canceled.

You may wish to bulk cancel in waves, filtering for different attendee types one group at a time. This is a useful way to be able to check your cancellation processes in smaller groups of attendees.

> **NOTE:** Remember, if you have cancellation policies in place, any penalties that are present in those policies are automatically applied to Registrations, Functions, Accommodation and Travel. Any penalties that apply to Exhibitors and Sponsors are managed manually by your team.

Issuing refunds

You need to decide if you'll be issuing refunds or credits to attend a future event.

If you're providing credits, you'll want to create a new payment type, typically based on the Cash account type, and give it a unique name, such as Event Credit. In this way, you can issue refunds for all outstanding fees, but you'll retain the funds under a different account that your team can easily track and report on.

If you are processing actual refunds, you'll want to coordinate with your Accounting Team so you can record check refund details.

For credit cards, you may choose to process all refunds external to EventsAir and then record those refunds directly on each attendee's record. If credit card payments were made online in an Interactive Site, you may also be able to process refunds directly in EventsAir, if you have the receipts and the correct balance of money available.

Accommodations and other vendor inventories

Once you've successfully canceled all your attendee registrations and processed refunds to your event, you've finished the cancellation process in EventsAir. However, you still need to communicate with and manage contracts you have with your accommodation and other suppliers, but there really isn't a need to remove inventory from any of your functions or accommodation settings.