

CONNECTING PEOPLE THROUGH EXPERIENCES

AM WORKBOOK TRAINING SERIES

Frequently Asked Questions

One Standard, Every Account: Rethinking the AM Workbook

About this FAQ These questions were asked by account managers during the AM Workbook training sessions, along with the answers the team gave. Use it alongside the training deck as a quick reference — if your question isn't answered here, reach out to Cara Roach, Sheila LeMaster, or Robin Mullins.

1. Why We're Updating the AM Workbook

The reasoning behind the rollout

Q: Why is Fern updating the AM Workbook now?

A: Three reasons. First, to align account management with the Core, Strategic, and Experiential service models introduced at the company meeting. Second, to build consistency — a standard workbook so any account manager can open any show and know where to look. Third, to build in measurable indicators (KPIs) that give the team visibility into account readiness and where a show stands at any point in the process.

Q: Do I need to rebuild workbooks I've already started for upcoming shows?

A: No. If you already have a workbook in progress, you don't need to start over or re-enter information you've already gathered. Just add any new KPI items or changed sections that apply to your show. Use the updated template for any new show or client you start going forward.

Q: When do the updated workbooks take effect, and how will I hear about future changes?

A: Any show starting after September 1, 2026 should use the new workbooks. If a workbook for a show landing in mid-September is already complete, you don't need to redo it. Minor edits will be made directly to the master files in the AM Resources > Workbooks folder, so always pull from there rather than an old saved copy; any major update will also be sent out by email.

2. Service Models

Core, Strategic & Experiential

Q: What are the three service models, and how do they map to workbooks?

A: Core (revenue generally under \$500K, mostly show organizers running traditional association conferences and trade shows), Strategic (agencies, show organizers, and INVNT partnerships, generally over \$500K, including large national trade shows), and Experiential (corporate events, sales meetings, and user conferences, with no revenue threshold). Core has its own AM Workbook; Strategic and Experiential share a combined workbook because their requirements are similar.

Q: My show doesn't cleanly fit one service model — what do I do?

A: The thresholds are guidelines, not hard lines, and some shows will land in between. When a show is a borderline case, talk it through with your supervisor to decide which model — and which workbook — fits best.

Q: Is Strategic or Experiential considered “better” than Core?

A: No. The service models describe different client needs and approaches, not a tier of importance. Core remains the majority of Fern's business and is where Fern's GC expertise is strongest; Strategic and Experiential reflect the growing corporate and agency client base the industry is trending toward.

3. What's Changing in the Workbook

New requirements by service model

Q: What's new for Core accounts specifically?

A: A 30-day production call and a 10-day production call are now mandatory, with updated call agendas already built into the workbook.

Q: What's new for Strategic and Experiential accounts specifically?

A: Three additions: Creative Services and Exhibitor Services should be engaged starting at kickoff; a 90-day and 60-day financial review is required for any new event or new client; and 40-day and 10-day production calls are mandatory, with agendas built into the workbook.

Q: Is there guidance on exactly when to schedule the 90/60/40/10-day calls, or a reminder to set them up?

A: Not yet a formal, system-generated reminder. Best practice is to schedule each call at least 10 days ahead so the team has time to plan around it.

4. KPIs & Tracking

What gets measured, and why

Q: What exactly gets tracked as a KPI?

A: Five items, each flagged on the Workbook Checklist: the Show Information Sheet completed (6 months prior to show open), the AM Workbook Checklist milestones, the Production Schedule finalized (7 days prior to show open), the Pre-Show P&L completed (Strategic and Experiential only), and the Production Calls completed on schedule.

Q: Are KPIs used to evaluate my individual performance?

A: No. KPIs are an early-warning system for whether a plan exists and is current — not a personal scorecard. They're meant to flag when a show may need extra support, not to grade an account manager.

Q: Who is responsible for tracking KPIs on a show?

A: The financial owner of the event. That's usually the direct supervisor tied to the show in Salesforce, but on shows where the “owning city” differs from the account manager's home city, the financial owner may be a colleague in that owning city who processes the P&L. If you're not sure who owns the P&L for your show, check with your GM or supervisor.

Q: I was only assigned to an experiential show a few months out — can the 6-month Show Information Sheet deadline flex?

A: Six months is the general target, but Fern recognizes experiential shows are sometimes assigned closer to the event. Work with your supervisor to set a realistic deadline in those cases.

5. Finding & Saving Workbooks

Where things live, and how to keep them current

Q: Where do I find the current AM Workbooks?

A: FX Hub > Account Management page > AM Resources > Workbooks folder (the purple folder). You'll find two files there: the Core AM Workbook and the Strategic & Experiential AM Workbook.

Q: Where should I save my workbook, and is it the same as the Production Workbook?

A: Download a fresh copy from the Workbooks folder and save it under the job number in the branch hub of the show's firm-owning city (confirm that city in Salesforce). Always pull the latest version rather than reusing an old saved copy, since the Workbooks folder holds the most current file. Note that the AM Workbook and the Production Workbook are two separate files on two separate SharePoint sites — the AM Workbook lives on the Account Management site, while the Production Workbook is maintained on the Operational Production site. If your production manager needs the production schedule, you may need to share it with them directly.

Q: I work with a production manager in another city — will they be able to access our workbook?

A: Fern is working with the production management team so production managers have access across offices without needing to be added manually. If someone on your team is still running into access trouble, flag it to Robin or Sheila.

6. Known Issues Being Addressed

Reported during rollout — no action needed on your end

Q: The Show Information Sheet prints very small — is that expected?

A: No, that's a known formatting issue on the Core workbook and it's being corrected. If you run into it, you don't need to fix it yourself — it's already been reported.

Q: Items I type into the extra/specialty lines on the load list don't show up on the printed pull list — is that a bug?

A: This has been reported and is being looked into. In the meantime, if you have a long list of specialty or storage items, plan to communicate them to your warehouse team directly until the print issue is resolved.

Q: Will there be a standardized service desk setup across all cities?

A: Not yet — desk setups still vary by city, and there are more configurations than a single standard easily covers. Several cities have moved from Octanorm desks to a more standard AGM-style desk, but a fully standardized setup (and matching graphics/ordering process) is still being worked through.

7. Handoffs, Support & What's Next

Getting help and giving feedback

Q: Information from Sales at handoff is sometimes inconsistent — is that being addressed?

A: Yes. The Show Information Sheet is part of the fix: Fern is working with the sales team to have Salesforce hold this information so it can eventually populate the Show Information Sheet automatically, cutting down on what account managers have to track down themselves. Fern is also emphasizing that handoffs include an actual conversation, not just a report or email, and prioritizing client onboarding meetings — especially for Strategic and Experiential accounts.

Q: What if something in the new workbook isn't working for my show?

A: Email Cara Roach, Sheila LeMaster, or Robin Mullins directly. Feedback from account managers — including the peer review that shaped this rollout — is what drives every update, so specific, real examples are especially useful.

Q: What's next for the AM Workbook long-term?

A: The longer-term goal is to move more of this information into Fern's systems (Salesforce and Oasis) so fields auto-populate across tabs instead of living in a static spreadsheet. There's no firm timeline yet, but it's the direction the team is working toward as Oasis rolls out further.