

**Self-Serve Guidance for Events, Sponsorship,
Industry Association Memberships, and Donation Agreements**

These types of contracts do not require review by Legal. Stakeholders should identify the type of applicable event below, and follow the guidance.

If you would like to sign the agreement electronically using DocuSign, please ask if the event organizer/speaker can initiate. If you would like to initiate, please reach out to [DocuSign Administrators](#) to set up a sender's account.

(A) Events Hosted by McKinsey

- Please submit your request to Optimize Events using the [Event Request Form](#).
- Once you register the event, the Optimize Events team will be in touch to advise on the event planning process from sourcing and contracting through to payment for your event.

(B) Speakers for Internal Training (events that will only be attended by McKinsey employees)

- If we are only inviting a speaker for internal training or an internal meeting, you may use the Firm's standard contract: [Coaching Agreement](#).
- Otherwise, you may use the contract form provided by the speakers. If using the speaker's contract form:
 - Remove language in the contract that permits the speaker to use the McKinsey name, and replace with "Speaker cannot use McKinsey's name without McKinsey's prior written consent."
 - Inform the speaker that all non-public information must be kept confidential.
 - If you must share our employees' information with the external speakers (e.g. our employees' names and email addresses), please consult privacy@mckinsey.com.
 - Obtain and document the speaker's consent if McKinsey will record the event, and use the recording for our internal business purpose and for our work with clients.
 - If the speaker wants a copy of the recording, inform speaker that it is only for personal use, and not for public circulation.
- Please complete the supplier vetting through the Firm's supplier portal [Aravo](#). For any questions, please refer to this [reference document](#) to guide you through the Aravo process.

(C) External Speakers at McKinsey Events

- You may use the Firm's standard contract: [Speaking Agreement \(External Speaker at McKinsey Event\)](#)
- Otherwise, you may use the contract form provided by the speakers. If using the speaker's contract form:
 - Review the contract carefully to ensure that McKinsey can meet the commercial requirements, including payment terms and any refund policy.
 - Remove language in the contract that permits the speaker to use the McKinsey name, and replace with "Speaker cannot use McKinsey's name without McKinsey's prior written consent."
 - Inform the speaker that all non-public information must be kept confidential.
- If you must share our employees' information with the external speakers (e.g. our employees' names and email addresses), please consult privacy@mckinsey.com.
- Obtain and document the speaker's consent if McKinsey will record the event, and use the recording for our internal business purpose and for our work with clients.
- If the speaker wants a copy of the recording, inform speaker that it is only for personal use, and not for public circulation.
- Please complete the supplier vetting through the Firm's supplier portal [Aravo](#). For any questions, please refer to this [reference document](#) to guide you through the Aravo process.

(D) McKinsey Speakers at External Events

- External Communications must first grant permission for McKinsey to be associated with the event.
- You may use the Firm's standard contract: [Speaking Agreement \(McKinsey Speaker at External Event\)](#)
- Otherwise, you may use the contract form provided by the organizers. If using the organizers' contract form:
 - Review the contract carefully to ensure that McKinsey can meet the commercial requirements.
 - Remove language in the contract that permits the event to use the McKinsey name, and replace with "Event organizer cannot use McKinsey's name without McKinsey's prior written consent, except to promote the event shortly before the event and for six months thereafter."
- Any recording of the event can only be used internally by the organizer.
- **[Optional]** - McKinsey may copy and distribute the tapes and the transcript of the event for its internal business purposes and for work with its clients.

(E) "Sponsorship" Agreements

Where McKinsey pays a fee to attend events and be recognized as a "sponsor". Charitable Sponsorships, please see below.

- External Communications must first grant permission for McKinsey to be associated with the event.
- Review the contract carefully to ensure that McKinsey can meet the commercial requirements, including payment terms and any refund policy;
- Remove language in the contract that permits the organizer to use the McKinsey name, and replace with "Organizer cannot use McKinsey's name without McKinsey's prior written consent. Even when McKinsey grants such permission, any license to use the McKinsey name terminates at the end of the event."
- Any recording of the event can only be used internally by the organizer.
- Avoid creating any customized presentation materials that the event organizer may claim ownership over.
- **[Optional]** - if you want to exclude our competitors from being sponsors, please include in the contract: "Organizer will not contract with another management consulting firm as a partner or sponsor for the event."
- **[Optional]** - McKinsey may copy and distribute the tapes and the transcript of the event for its internal business purposes and for work with its clients.
- Please complete the supplier vetting through the Firm's supplier portal [Aravo](#). For any questions, please refer to this [reference document](#) to guide you through the Aravo process

(F) Industry Association Membership Agreements (McKinsey pays a fee and we get the membership)

Review the contract carefully to ensure that McKinsey can meet the commercial requirements, including payment terms and any refund policy.

(G) Donation and Charitable Sponsorship Agreements

Charitable donations and sponsorships are addressed in Sections 2.8.2 and 2.8.3 of the [Firm's Anti-Corruption Policy](#). Complete guidance on such donations and sponsorships are available here: [Anti-Corruption Guidelines for Charitable Donations and Charitable Sponsorships](#).

Please read the above before proceeding.

- Such donations/sponsorships require pre-approval, which can be obtained here: [Charitable Giving Anti-Corruption Pre-Clearance \(CGAP\) tool](#); and
- Charitable donations must be accompanied by [this cover letter](#).