



# Unit 8 Managing an Event & Conference

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Plan a complete corporate event, including an agenda, budget, goals, venue, audience, food, and whatever else your client needs
- ✓ Keep your event on budget
- ✓ Design an advertising and marketing plan that includes a comprehensive use of media, take- aways, and/or swag bags
- ✓ Determine whether partners, sponsors, and volunteers can help to make your event unforgettable
- ✓ Create an atmosphere of service that delegates will remember
- ✓ Select speakers and a master of ceremonies to add impact to your event
- ✓ Create a diversity plan
- ✓ Evaluate the process once it's all wrapped up



## Setting Goals and Objectives

One of the first things to consider as you start planning is what the purpose of the event is. You may be told this outright by your boss (“I want you to arrange a quarterly meeting for 10 of our internal staff”), or you might need to do some interviewing and conduct a more formal needs analysis. Whichever approach you take, here are some questions to ask as part of your initial planning. (You can organize these answers into your event plan and into a formal needs analysis if you like.)

- What is the purpose of the event? (Information sharing, retirement celebration, 30 year work anniversary, annual meeting, trade show, conference, workshop, etc.)
- Who will attend? (This is your main audience.)
- What is the budget?
- How formal is the event: formal, semi-formal, casual, or some other mix?
- Is there a preferred venue?
- Is someone leading the event, or do we need a master or mistress of ceremonies (MC)?
- Are there preferred speakers?
- Are there any restrictions on food and drink? (Make sure you include thoughts on alcohol)
- How often does the client want you to provide a status update?

As you have your first planning conversation with your manager or client, other questions will arise. For example, if the event is formal, do they also expect a written invitation or are e-mail invitations suitable? If there is a preferred MC, does your manager wish to ask the person, or do they prefer you to do that?

Following this initial meeting or telephone call, you need to prepare a written document to confirm the decisions that have already been made. This could be in the form of a needs analysis, briefing, or an e-mail, depending on your organization. Whichever format you use, you need to call on your passion for details when preparing the document so that no essential elements are missed.

### How to Write a Briefing Note

#### **What is a briefing note?**

A briefing note is often used in government as a way to keep senior officials informed about all kinds of topics. They are very handy in business, too, because they are such a concise way to communicate. Briefing notes have many formats, but this section will discuss some essential elements that are always included.

**What makes a good briefing note?**

A well-written briefing note quickly provides an update on a person, issue, or (in our case) an event. The briefing note is clear, concise, complete, and correct. It should be:

- **Short:** One to two pages long. Use headings and sub-headings, lists, bullets, and white space to make reading easy.
- **Clear:** Simple and to the point, this is not the time to mystify the reader with your writing skills.
- **Concise:** Every word is necessary and used efficiently. Include only the information that matters to the reader.
- **Complete:** The reader should not have to come back to you with questions. If there is information missing, point it out.
- **Correct:** Make sure that your facts are correct. Don't make assumptions.

**How should your briefing note be formatted?**

Include only the sections that are relevant to your reader. There are lots of variations on format. Your company may have a preferred format to make things simpler. If they don't, here are your guidelines.

**What should be included in your briefing?**

The following points are also required in many briefings. Remember, just use the ones that you need.

*Background*

Details the reader needs to understand about how the current situation came about, problems that have been encountered, and history of the topic. Don't include statements that are repeated in other sections.

*Current Status*

Describe the current situation, people involved, and the current state of the matter or situation.

*Key Considerations*

Facts, considerations, and developments go in this section. You need to objectively present the details needed by your reader so that they have all the information required to make a decision. Substantiate anything that you state with evidence. If you think that they may need some more details, you can attach an appendix.

*Next Steps or Options*

Your thoughts and observations on the key considerations, along with a concise description of the options, pros and cons, or simply what will happen next.

*Conclusions and/or Recommendations*

Summarize the essential elements of what the reader needs to know. Busy people skip to this section and read it first and then go back only to read what they need to, so don't introduce anything new here. If you are making a recommendation, be sure that it is clear, direct, and is the best advice that you can offer.

## Getting Organized

Event planners are very detail-oriented and well organized. It helps to take advantage of planning tools to keep track of everything, and there are many options available today. We will use a basic spreadsheet application to set up a table, which are easy to modify and format. You can also look at special event organizing programs or project management software that your organization may already be using.

The image below shows a starting template for you to keep things organized. When you design your sheet, simply add columns and rows that are specific to your event and the things that you need.

### Event Planning Worksheet

Event name: _____								
Event date: _____								
Task	Status	Budget	Actual Cost		Comments	Due Date	Assigned	
<b>Initial Details</b>								
Develop event theme								
Develop colors								
Set up committee								
<b>Budget</b>								
Identified in needs analysis								
Discuss with accounting								
Submit for final approval								
<b>Venue</b>								
Identify three options								
Visit two options								
Sign contract								
<b>Agenda</b>								
First draft								
Second draft								
Third draft								
<b>Marketing and Promotion</b>								
E-mail campaign								
Telephone campaign								
Mailouts								
<b>Swag Bags/Gifts</b>								
Bags ordered								
Items received								
Bags filled								

About the 🟢🟡🔴 (GYR) Column

GYR borrows from project management symbols and the green-yellow-red lights of a traffic signal. **Green** means that this task is on track and will be completed on time and budget. **Yellow** means caution: there is a risk that this task will be delayed or over budget. **Red** means that the task is way off track.

As the event planner, your job is to keep everything green. When they do go yellow, you must do what’s needed to get things back on track. You will probably need to speak with your manager or client and the committee so that you can strategize a plan. When things go red, they’re serious. You must react immediately to return the task back to a green state.

## Budgeting Basics

### Pre-Assignment Review

#### Pre-Assignment

You are going to plan a meeting for 20 employees in the marketing department. The meeting will have to be held at a nearby hotel or conference center since you do not have a big enough room at the office. Your task is to create a budget for the 4 hour meeting (9:00 a.m. until 1:00 p.m.), which will include a lunch. You also need to include a gift for each delegate: an 8GB USB memory stick with the company logo stamped on it.

Item	Budgeted Amount
Room Rental	
Lunch	
Coffee/Tea	
Alcohol	
Gifts	
Estimated Total	

Is there anything missing here?

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## The Real Budget

Here is a sample budget calculation worksheet, which is broadly based on what many events need.

### Budget Planning Worksheet

Event name: _____		Tax Rate: _____			
Event date: _____					
Item	Budgeted Amount	Amount Per Person	Total Estimate	Actual Amount	Comments
<b>Revenue</b>			\$0.00		
Ticket Sales			\$0.00		
Sponsors			\$0.00		
Partners			\$0.00		
			\$0.00		
			\$0.00		
<b>Expenses</b>			\$0.00		
Insurance			\$0.00		
Licensing (alcohol, etc.)			\$0.00		
Permits			\$0.00		
Vehicle or Room Rental			\$0.00		
Parking			\$0.00		
Security			\$0.00		
			\$0.00		
<b>Meals</b>			\$0.00		
Food and Beverages			\$0.00		
Alcohol			\$0.00		
Service Charge/Gratuities			\$0.00		
Bartender Labor Costs			\$0.00		
			\$0.00		
<b>Room Setup</b>			\$0.00		
Rental			\$0.00		
Refreshments			\$0.00		
Set Design/Props			\$0.00		
Projector			\$0.00		
Computers			\$0.00		
Writers/Podium			\$0.00		
Flower, drapery, and fabric			\$0.00		
Lighting			\$0.00		
Audio equipment			\$0.00		
Audio-visual equipment			\$0.00		
Entertainment			\$0.00		
Power			\$0.00		
Entrance Area/Reception Fees			\$0.00		
Setup/Tear Down			\$0.00		
Table Accessories			\$0.00		
			\$0.00		
<b>Speakers/Entertainers/MC</b>			\$0.00		
Meals			\$0.00		
Accommodation			\$0.00		
Transportation (incl. mileage)			\$0.00		
			\$0.00		
<b>Staffing Costs</b>			\$0.00		
Event Management Staff			\$0.00		
Production/Technical Staff			\$0.00		
Tradespeople (Carpenters, electricians, etc.)			\$0.00		
General Event Labor			\$0.00		
Delivery Costs			\$0.00		
Union Dues			\$0.00		
Crew Costs			\$0.00		
Meals			\$0.00		
Accommodations			\$0.00		
			\$0.00		
<b>Miscellaneous</b>			\$0.00		
Parking			\$0.00		
Event Management Fee			\$0.00		
			\$0.00		
<b>Estimated Summary of Expenses (before tax)</b>			\$0.00		
Tax Amount			\$0.00		
Contingency Fund			\$0.00		
			\$0.00		
<b>Total estimated expenses</b>			\$0.00		

## Getting Strict About the Budget

Budgets are a critical piece of event planning. If you wish to build credibility as an event coordinator and be asked to be involved in future events, you must respect and stick to the budget that gets approved.

You cannot go over budget under any circumstances, which sometimes means that you have to eliminate some aspects of your plan. This is similar to budget reductions at home: you might have to give up something that you thought was really important, but you cannot have it all.

### **How will you manage budget shortfalls?**

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### **In the example in the pre-assignment, imagine that your budget is cut by 15%. What, and how, do you cut?**

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## Volunteers

Volunteers can make or break any event. A small meeting will probably just require your attention on the day of the event, but sometimes we need much more help. Volunteers can help you to coordinate everything and to keep the event day running smoothly.

Just because someone volunteers to help does not mean that you can treat them differently than your paid staff. Volunteers are giving you their time, and you need to treat them as a precious resource *even if your volunteers are colleagues from work*. Even your co-workers are taking time away from their work to help you out, so be sure to appreciate them.

Just like your committee members, volunteers need to know:

- What your expectations are
- What their responsibilities are
- Where to be and when
- Their job description or role, preferably in writing

Volunteers and your committee members all need to be properly thanked either at the event or immediately afterwards. Remember that you cannot get everything done without them. Remind them how much a part of the team they have been. A small gift, a token of the event, or something personally meaningful to each individual helps to add emphasis to your sincere gratitude.

**Generate some thank you gift ideas that are appropriate for the type of events that you plan.**

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## Doing Delegation Right

Let's see what makes delegation so fantastic! Delegation is not about giving responsibility away to someone else. You are the event coordinator, which means you are the one ultimately responsible for the results. But we've established that no matter how big your event is, it can be easier for you if you share the work around a committee.

### Why do we resist delegating?

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### Why do we resist having others delegate to us?

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### What are some important things to remember when we delegate?

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Don't waste your time doing things that somebody else can do, especially if they can do them better than you. Save your time for things that you are uniquely qualified to do. In addition to reducing your workload, delegation helps your staff or committee members learn new things and to take risks while they have you there for backup (if needed).

Delegating does not mean that you give away work completely. As the person responsible for this event, you must remember that you are ultimately responsible for the results that are achieved.

If you are not in a leadership position, you may be thinking that you don't have anyone that you can delegate to, but that's often not the case. In complementary work teams, we can also delegate laterally to a colleague who has a particular expertise, who is looking for some skill development, or simply has some extra time.

In *The Creative Edge*, author William C. Miller defines five levels of delegation:

- **Tell:** "Based on my decision, here's what I want you to do."
- **Sell:** "Based on my decision, here's what I want you to do, because..."
- **Consult:** "Before I make a decision, I want your input."
- **Participate:** "We need to make a decision together."
- **Delegate:** "You make a decision."

You must find ways to delegate, no matter what your position is. Learn to clearly define who is to do what and let them show you that they can do it. Make sure your communication is clear so that they know what your expectations are. Also make sure that you communicate any limitations to the assignment, such as budget, time, or other resources.

There are five steps to the delegation process:



# Connecting with Partners and Sponsors

## Benefits of Support

Let's look at some additional places that you can gather support for your event. Partners and sponsors can help you share the costs of an event, promote your event, and assist with providing committee members and/or volunteers.

### Partners

A partner is often another company who wants to be a part of your event. If you are hosting a conference or some kind of training, for example, you can sometimes approach another company who might also be interested and share the costs of the event with them. Depending on your relationship and how many partners you can attract, you might share the costs equally, or your company may hold responsibility for a larger portion of the cost as a way of developing relationships with the partner companies.

One way to acknowledge your partners is to have their logos or business information at the event. You can provide them with table space for displaying merchandise or have the MC introduce them in the remarks. Whatever route you take, it is important that delegates see the presence of the partner relationship.

If the event you are planning is a conference, trade show, or training event, approach companies in your area and ask them if they are interested in partnering with you. Explain what the event is and how you see them partnering well ahead of the event itself. It's an insult to be asked to be a partner when the invitation comes a few days ahead of an event and the partner really feels like you are asking out of desperation for delegates or because you need money.

### Sponsors

A sponsor may be at the event or may simply offer to pay for part of it. One common example is to ask sponsors to pay for a refreshment break during the day. When delegates go to the refreshment area, a large sign can be placed there informing everyone who the sponsor is. Another example: during golf tournaments, a sponsor may have a sign placed at the tee area.

Sponsors may also agree to donate some kind of gift, take-away item, or swag (like a coupon) which is placed into each delegate's bag. Or, perhaps their logo is printed inside the program.

## Step Up and Ask!

**Think of the pros and cons to inviting partners or sponsors to work with you on your events.**

Pros	Cons

**Identify companies in your industry or geographic area that you can ask to partner with and/or sponsor your events.**

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# Advertising and Marketing

## Getting the Word Out

### Small Events

Depending on the size of your event, you might need to do very little communicating with people. Smaller workplace based events are often managed with e-mail, using meeting requests sent through a calendar program like Outlook.

### Mandatory Events

If you are arranging a mandatory event, make sure that the invitations specify why it is mandatory and have it endorsed by a workplace leader (such as a manager, director, vice president, or CEO) or your human resources department. If you are perceived as a planner ordering people to attend, it's very likely that some people won't show up, and that's no good.

Even for mandatory events, which you might assume people will add to their calendar, it is worth your efforts to send out a couple of reminders about the event. Be sure to emphasize the benefits of attending, who the speaker is, or what the event is all about. If you are arranging a meeting, it can be helpful to send a copy of the agenda to everyone 24-48 hours before the event gets underway. (24 hours is fine if participants have no preparation to do. They will need more time if there is reading, research, or tasks to be completed before the start time.)

### Large Events

Larger events generally require more contact with potential delegates. Touch number one is when they receive your first e-mail, brochure, or perhaps a phone call. As registrations start to arrive, you can arrange for your registration team to process them while you or the marketing team arrange for additional touches.

You don't need to harass your potential delegates, but you want to let them know what is happening. Use different approaches to reach people, since some will read your e-mails, some will connect to you through a website, and others will read a glossy brochure that is addressed to them. Essentially, you want to touch your clients as many times as it takes to make a decision, without scaring them off. (Remember that if there is a fee for your event, they may have to get approval to spend the money.)

If you are planning a large social type of gathering (such as a long service anniversary or retirement) that delegates attend for no charge, you can sometimes get away with as few as three touches. For other events, such as a conference where delegates pay a fee and attendance is not mandatory, you may need eight to twelve touches.

### Gathering Support

Make the most of your network. Ask people who have attended previous events to invite at least three of their friends or associates. Referrals are a powerful way to get a message out, especially when people know that there is value in what you are offering.



## Take-Away Planning

We're including take-aways (also referred to as "swag") in the marketing section because the goodies that someone finds in their take-away bag really are an extension of your marketing and the brand associated with your event.

When you start planning what is going into swag bags, think about it carefully. The goal is not for people to take the bag home and throw it away, although this is what frequently happens. Sometimes event coordinators are so keen to get whatever they can in the bag, they accept donations of everything that is offered. In a practical sense, this is reasonable: we always have tight budgets, and so when we ask the boss for a donation and he offers a package of golf tees, we graciously say thank you. However, if the event that you are arranging is for 300 administrative assistants and only 5% of them golf, you might be missing the mark. They may give the golf tees away, so they won't be wasted, but they may also be shaking their heads about you and wondering why you didn't find something that they would like.

People attending your events want to be the center of attention. Whether they pay to attend your event or not, they want to be acknowledged. Usually, however, the center of attention is the keynote speaker, one special guest, or sometimes the event planner.

A typical swag bag might include a copy of the keynote speaker's most recent book or a postcard advertising the book. Then there is a postcard advertising the hotel where the event is being held. Another postcard advertises a sponsor and a bookmark lists all the partners of the event. A thick binder of materials accompanies the bag. This requires that people juggle a bag, a binder, and a cup of coffee, all within the confines of the conference room table.

We want to challenge you to consider your take-aways and the conference binder in the same sense that a designer would. Is a bag of recyclable paper sending them the message that you want for your conference? How many delegates will get that bag home and throw out or recycle the contents? What other things could you do?

In an age where people often carry their laptops or tablets, maybe there is a better way to set up your event. For a conference or workshop, what about an electronic approach that leverages network access?

- Attendees register for the event and receive login information.
- They get to their seats, which each have power and network jacks.
- They log into a portal site where they can access the usual binder notes in electronic format.





# Feeding the Masses

## Setting up the Menu

People love food. Gathering to share a meal is one of the most social, engaging times that we share. It is essential to choose the right menu for your event.

Whether you're planning a three-hour meeting or a three-day conference, food can become your biggest expense. Food is also an area where you can exercise some creativity and apply some flexibility. It is also helpful if you can plan with some empathy.

### Confused?

Allergies, food sensitivities, special diets, cultural norms, and what we wear all have to be considered when ordering food. People are much more aware of what they eat than ever before and there are also more people talking about what they need. At the same time, people want an experience when they attend an event, so the food had better be good.

Here is an example of some of the thinking an event planner goes through in terms of food arrangements. Sometimes **pizza** and **sodas** are enough for a short lunch meeting, but for diabetics it also contains a massive carbohydrate load. For anyone with gluten intolerance, wheat crust is on the no-no list. Toppings that are full of nitrates or salt can be a problem, too. But some people absolutely love pizza, and placing an order to the nearby pizza shop is easy enough to do.

**Soups and salads** can be ideal and healthy, but people worry because they tend to drip and can mark or stain the front of people's clothing.

**Sandwiches** can be tasty, healthy, and appealing, but they can also be uninspiring or downright boring. If left sitting for any amount of time, the bread dries out and the mayonnaise starts to go off. Some delegates will balk at sandwiches if they see people's hands reaching in and touching food that they do not take onto their own plate. Food allergies and cross-contamination are also a consideration.

**What about alcohol?** Although many North American functions do not include alcohol at lunch, it is often part of supper. In other places, there is no alcohol at all, and in other countries, a drink at lunch is perfectly acceptable.

**So the question remains: how do we offer food and refreshments that people will enjoy? How can you feed people in a way that helps them enjoy a meal, caters to everyone’s needs, and respects your budget?**

- Always do the best you can.
- However, remember that you cannot please all of the people all of the time.
- Your best strategy is to offer a variety of selections so that everyone can choose what they’d like.
- Make sure to ask about allergies and preferences upon registration.
- Have a contingency plan to deal with unexpected issues.

## Finding Food Solutions

**Brainstorm food arrangements for the following situations.**

**Your office**

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**Hotels and conference centers**

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**Parking lots on hot dog day**

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**Unique venues in your area**

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**The types of events that you will organize**

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## Business Etiquette Basics

### Don't Be Afraid!

This topic scares some people to death, but we wish it wouldn't. The essence of good etiquette is not actually related to knowing which fork to use and when (although those things are helpful), or how to shake hands when you are holding a plate of food. Etiquette is really about having some kind of baseline so that we can all share time together and enjoy ourselves without worrying that we are behaving badly.

Rules about not leaning across the table to reach the salt shaker are not so much about trying to avoid looking awkward and being excruciatingly polite: they stop you from knocking over a water glass or dropping your lint into someone else's meal. And, when you ask for someone to pass the salt (which should always be passed along with pepper, whether you want it or not), you get a chance to have a conversation or share a few comments.

If you are arranging an event that will be attended by delegates who might feel intimidated, you could arrange for a pre-meeting etiquette session. You might be surprised at how much interest there is and by how many people are freaked out when it comes to figuring out where their glass, bread plate, or forks are. If you think that they may be shy, you could also include a quick reference guide with the welcome materials to help them out.

Although an etiquette guide seems over the top, think about the first engagements you attended back when you were first entered the workforce. Did your parents or grandparents teach you these things? If so, you're off to a great start! If not, you could probably benefit from a brush up on etiquette. Besides, things continue to change and evolve.





# Celebrating Diversity

## What Does It Mean?

We pay plenty of attention to diversity at work and we have to do the same when it comes to event planning. We discussed a few key ideas yesterday, but there is a lot more to consider.

Respecting diversity is an essential element of interpersonal relations and cross-cultural relationships. The goal of a diverse organization is to include people of all backgrounds and not to restrict anyone's opportunities to participate, grow, and succeed. Diversity is protected by law in some (but not all) countries.

As we become more understanding about diversity, the following areas are those that we most often pay attention to:

- Race
- Gender
- Religion
- Age
- Cultural background (ethnicity)
- Abilities and disabilities
- Marital status
- Family status (families with and without children, single parents, caring for aging parents)
- Appearance (style of dress, hair, body size)

When you are responsible for event planning, you must be inclusive to ensure that that everyone who attends will feel equally welcome.

## Diversity Assessment

### Diversity Attitudes

Select yes or no for each of the statements below.

	Yes	No
I have visited at least one other country.		
I can fluently speak more than one language.		
I can read in more than one language.		
I use a second language regularly.		
At least one of my friends has an identified disability.		
My friends include people of different cultural backgrounds than my own.		
My friends include people of different ages.		
I would accept (or have already accepted) a work assignment in another country.		
I have art from different countries or cultures in my home.		
I have a valid passport.		
I keep tabs on news about countries other than my own.		
I volunteer or have volunteered with people-based organizations.		
I mentor new staff at work.		
I feel (or would feel) comfortable with a friend who is gay, lesbian, bisexual, and/or transsexual (GLBT).		
I read books from different countries or cultures.		

## Scoring

**Number of Yes Responses:** \_\_\_\_\_

**Number of No Responses:** \_\_\_\_\_

If you answered “yes” to 10 or more of the questions above, you most likely function very well in a diverse environment. If you answered “no” to 10 or more questions, we are going to challenge your thinking. You need to develop more diversity awareness and skills to function effectively in a diverse environment, and there are no shortcuts except to work to get you there. As the world becomes more globally engaged and you plan events that are meant to include people from different regions, as well as the diverse population within your own community, your self-development will have a huge impact on your own success.



# Selecting Speakers and a Master of Ceremonies

## People in Your Event

Selecting the people who will be the public face of your event requires some careful planning. If you are going to have an MC, you've got to make sure the budget allows for it. Your boss (or client) may have someone in mind, or they may want to perform this function themselves.

This can also lead to some challenges. What if the person they want is not a good public speaker? What if they never follow the agenda that you so carefully design?

## Special Guests and Dignitaries

If your mayor, a member of parliament or royalty, or a celebrity is attending your event, you need to have a serious security plan in place. You will probably also interact a lot with their staff, but not the dignitary themselves. Make sure you get briefed on how to address your Very Important Persons (VIPs) in any remarks by the MC and when you are introduced to them. Make sure that all event staff, volunteers, speakers, entertainers, hotel staff, and so on, are informed and that they agree to follow the rules.

VIPs can have a huge impact on rules for gifts, business cards, forms of address, use of gestures, and even the colors that decorate your event. You also need to know exactly what fees, accommodations, transportation, food, and special arrangements will be required. A celebrity may have one fee for their appearance and an additional fee for anything else that you ask.

## Speakers

Your manager or the client may know exactly who they want as speakers at your event, and they may not. If you can get a list from them, it will help your search tremendously. You'll need to make sure that the speaker has both the subject matter expertise and skill required. Don't expect a professional speaker to take part in your event for free, either. Check their website and then call to ask about their speaking fees, travel, accommodation, and so on. You can ask for references and many speakers will have a video that you can preview.

If you want to negotiate the fee, you can sometimes offer to allow them to sell copies of their books or promotional materials at the back of the room for a reduced fee.

To find speakers, check for referrals from other event planners and your local chapter of professional speakers. Some starting points:

- **In the United States:** National Speakers' Association ([www.nsaspeaker.org](http://www.nsaspeaker.org))
- **In Canada:** Canadian Association of Professional Speakers ([www.canadianspeakers.org](http://www.canadianspeakers.org))
- **Internationally:** Toastmasters ([www.toastmasters.org](http://www.toastmasters.org)) and other organizations

### **IMPORTANT**

Websites can and do change. Velsoft takes no responsibility for the content or accuracy of third party websites.

## People in Practice

**Where you can resource speakers in your area?**

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**What are your requirements for speakers?**

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**How can we get comfortable with hiring speakers, making arrangements for speakers, and handling VIPs and MC's?**

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# Managing Contracts

Working with contracts is an essential part of event planning. If you do not have a signed contract with your vendors, there is a good chance things will go wrong on event day, and that’s the last thing that you want.

You can add a contract list to your event plan in order to keep track of the status of each contract. Experienced event planners recommend that you have your own contracts (although some vendors want to use their contract) and that you have the other party sign them first. As well, make certain that everyone has a signed copy.

Contracts need to be detailed properly to protect you and the vendor. Your company may already have draft contracts they want you to use. They may even have a department that looks after contracts for you. Make sure you check out the requirements before you start.

Speak with your manager or client to make sure that you and they understand the contract. As well, make sure that you read the fine print closely. If you are working with a small company that has not worked with a lot of contracts, check with your company’s accountant, controller, or legal counsel.

If your event gets off track, the food is not delivered, the MC does not get paid, or the limos are not at the airport on time, your event will suffer, and as coordinator, you will be responsible. You are putting a lot of effort into creating a fantastic event, so don’t get sunk on the details!

## Who are your current contract contacts?

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## When will you reach out to them?

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## Gathering Feedback

### Gathering Feedback from Delegates

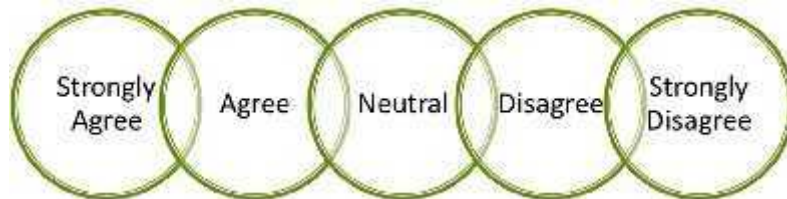
Feedback is an essential part of your event. It can be done on several levels. When you gauge people's reaction to an event, you are getting their initial thoughts on how much they liked what they experienced. While that won't really tell you what they learned, it is essential that they enjoy the experience if they are going to engage.

There are several formats that event planners use to evaluate their corporate events.

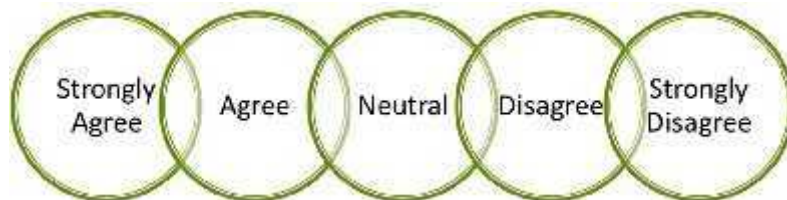
#### Quick Response

At the end of each session in the event, you can include a continuum that asks participants to quickly rate the segment. This gives you feedback on the room, session leader (speaker, trainer, yourself), and any other elements that you want to measure. You can do this in terms of "smiles" on the page, or a rating like the one below.

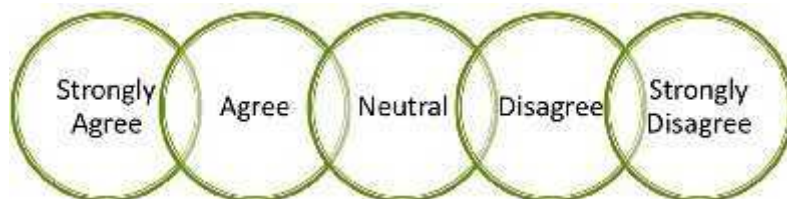
**The room was very comfortable during this session.**



**The speaker was effective and engaging during this session.**



**This session moved along at just the right pace.**



Another way of using the continuum is to place it on a wall. The five degrees may actually be posted via flip chart sheets at five wall positions or just pointed to in a general way: "Strongly Agree is here," "Agree is here," etc. Then let participants position themselves physically, in relation to the five degrees, to indicate their reaction or feeling about a given evaluation question.

### Formal Survey

For a more formal analysis, you can create a form with a few more details. Here is an example from a training workshop.

Course: \_\_\_\_\_

Date: \_\_\_\_\_

Instructor: \_\_\_\_\_

**PLEASE INDICATE YOUR CHOICE WITH AN X:**

1. Strongly agree
2. Agree
3. Not sure
4. Disagree
5. Strongly disagree

QUESTIONS	1	2	3	4	5	N/A
The materials were clear and easy to read.						
The transparencies and/or videos reinforced the course material.						
The hands-on scenarios helped you understand the course content.						
The instructor was prepared and knowledgeable.						
The instructor was gave clear instructions and answers.						
The instructor held your interest through the training course.						
The classroom facilities were clean and comfortable.						
You had enough time to finish each activity.						
The training course taught you what you wanted to learn.						
You would send others to Acme Training.						

**Suggested Improvements**

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## Designing Feedback

**What type of feedback should follow the events that you typically plan?**

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**Think about this comment: Much of the time, we really don't want honest feedback. We want complimentary feedback. We want to show our bosses or clients what great work that we do. And so, when constructive feedback arrives, we take it very personally and may feel attacked, or like all the good work we have done went unnoticed. Of course, usually the good work did not go unnoticed, and getting honest feedback is the only way we'll know what could improve from the delegate's perspective.**

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**How can we get honest feedback?**

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## Event Day Roles

### Things to Do

You've done all the planning, everyone's ready, and the delegates are about to arrive. What to do?

When the planning goes well, you might actually find the event itself anti-climactic. All that energy has been spent in ensuring that things go smoothly, so you can relax a little.

Your job during the event is to be the on-site coordinator and troubleshooter just in case something goes wrong. If people are getting lost on the way to the event, you can send them directions with your cell phone. If a volunteer gets ill and cannot sit at the registration desk, you must find someone else who can fill in. (At a small event, you might sit at the desk for a while yourself.) Someone needs batteries? You've got it covered.

We do recommend that you have some kind of emergency fix-it kit with you on event day. This includes all of the things that you think somebody (a delegate, speaker, sponsor, volunteer, or even yourself) might need. Things to include:

- Batteries (for lavalier-style microphones, walkie-talkies, etc.)
- Nail polish (in case someone gets a run in their pantyhose)
- Wet wipes (good for all kinds of things)
- Breath mints
- Small bottle of hair spray
- Needle and thread kit (miniature ones from hotels are ideal)
- Hair elastic and bobby pins
- Paper clips
- Safety pins
- Felt markers
- Masking or painter's tape
- Bandages
- List of phone numbers to closest medical clinic/hospital and taxis

### Other Items

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## Managing Your Image

You're planning an event, and whether you like this work and want to do it all the time, or you just get the opportunity now and again, part of your role is to impress your customer, client, and delegates with what you've organized. Remember your commitment to service, and that the image that you project (someone who is calm, cool, and collected) will be noticed by the people around you. Don't let them see you sweat, even if you are in a mild state of panic!

Make sure that you look like the person responsible for all these things going on. Even at a casual affair, you want to make a point of looking good. You don't have to buy a new outfit, but make sure that what you are wearing is clean, pressed, and sharp. Wearing layered clothes helps you to adjust easily in case the venue is too warm or too cold (and if it is, you'll need to speak with the venue coordinator and get it sorted out!). Shoes need to be polished. Whether you are male or female, we strongly recommend comfortable shoes that are broken in. For women, keep the heels low enough that you can maneuver for the entire day.

**Think of event planners who handle their image well.**

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**What are they wearing?**

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**What are they projecting?**

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**What's suitable for your upcoming events?**

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# Closing the Event

## Creating the Conference Report

Before lunch we spoke about evaluating the event from the delegate and client point of view. Now we're going to look at it from the event planner's point of view. The conference report is a bit like writing your own report card. It is an essential part of your event.

The conference report is a complete debrief of the event. As the planner, you'll need to look at the event planning worksheet and fill in anything missing. Then look at the other worksheets that you have created (like budget and contract lists) and fill in anything missing there, too. Depending on who your client is, or where the report goes, you may include rich details, or it may be a brief summary. Make sure your report is honest and complete. Include feedback that you received as well as compliments. All of these details are very important, especially if an event like this is planned in the future.

A conference report will usually include:

- Client's name and contact information
- Event name and date
- Venue name and facility (hotel, conference center, meeting room, etc.)
- Budget and overages or savings (usually presented as a balance sheet)
- Confirmation that all invoices are paid
- Logistics of the event
- Attendance (planned and actual)
- Food, bar, and refreshment numbers (including schedule and number of delegates)
- Office, audio, and business equipment booked and used
- Staging and decorations
- Breakout sessions
- Entertainment
- MC and speakers
- VIPs or special guests
- Accommodations booked and used
- Transportation booked and used
- Registration (prior to event, early bird, and on-site)
- Vendors
- Partners and sponsors
- Volunteers and paid staff
- Evaluation results

**Other Ideas**

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You don't have to do all the writing yourself. Remember to use your committee members and have them complete a report on their responsibilities and any problems they encountered. You can summarize their comments into the final report.

Lastly, add your own evaluation of the event. Include what went well and what you would do differently in the future.

## Holding the Post-Event Meeting and Thanking Those Involved

Depending on the size of your event, and the length of planning time that was involved, you may want to arrange for a post-event meeting with the members of your committee and potentially your manager. This is a good time to review successes, discuss any difficulties, and look ahead to how things can be managed next time. It's also one way to thank your committee members or planning team for all their hard work.

This meeting could be extended by hosting an event of its own afterward, with time for expressions of thanks and recognition of committee members and volunteers, a little food, and whatever else that you decide will be important. When we are busy, or return to the office at the conclusion of a large event, we might be too tired to think much about thank-yous, but these are an essential part of any event planners job.

**Think of the next event that you will plan (or one that you just completed recently). What forms of recognition would be a good fit for all that help that you received?**

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## Practicing Planning

### Creating an Event Plan Draft

#### Needs Analysis

**What is the purpose of the event?**

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**Who will attend?**

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**What is the budget?**

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**How formal is the event: formal, semi-formal, casual, or some other mix?**

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**Is there a preferred venue?**

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**Is someone leading the event, or do we need a master or mistress of ceremonies (MC)?**

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**Are there preferred speakers?**

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**Are there any restrictions on food and drink?**

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**How often does the client want you to provide a status update?**

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**Other Notes**

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## Event Planning Worksheet

Task	Status	Budget	Actual Cost	  	Comments	Due Date	Assigned
<b>Initial Details</b>							
Develop event theme							
Develop colors							
Set up committee							
<b>Budget</b>							
Identified in needs analysis							
Discuss with accounting							
Submit for final approval							
<b>Venue</b>							
Identify three options							
Visit two options							
Sign contract							
<b>Agenda</b>							
First draft							
Second draft							
Third draft							
<b>Marketing and Promotion</b>							
E-mail campaign							
Telephone campaign							
Mailouts							
<b>Swag Bags/Gifts</b>							
Bags ordered							
Items enclosed							
Bags filled							

Rough Budget

Item	Budgeted Amount	Amount Per Person	Total Estimate
<b>Revenue</b>			
Ticket Sales			
Sponsors			
Partners			
<b>Expenses</b>			
Insurance			
Licensing (alcohol, etc.)			
Permits			
Venue or Room Rental			
Parking			
Security			
<b>Meals</b>			
Food and Beverages			
Alcohol			
Service Charge/Gratuities			
Bar/Bar Labor Costs			
<b>Room Setup</b>			
Rental			
Refreshments			
Set Design/Props			
Projector			
Computers			
Flairs/Finishes			
Flower, drapery, and fabric			
Lighting			
Audio equipment			
Audio visual equipment			
Entertainment			
Power			
Entrance Area/Reception Fees			
Setup/Tear Down			
Table Accessories			
<b>Speakers/Entertainers/MC</b>			
<b>Meals</b>			
Accommodation			
Transportation (incl. mileage)			
<b>Staffing Costs</b>			
Event Management Staff			
Production/Technical Staff			
Trade people (carpenters, electricians, etc.)			
General Event Labor			
Delivery Costs			
Union Dues			
Crew Costs			
Meals			
Accommodations			
<b>Miscellaneous</b>			
Printing			
Event Management Fees			
<b>Estimated Summary of Expenses (before tax)</b>			
Tax Amount			
Contingency Fund			
<b>Total estimated expenses</b>			

## Presentations

### Evaluation Continuum



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Still needs  
a lot of  
work



3

You're  
getting  
there –  
good start!



5

Excellent  
work – this  
event is  
almost  
surely a  
success!

### Further Reading:

- ✓ *Anselmo, Donna. Marketing Demystified. McGraw-Hill, 2010.*
- ✓ *Baca, Claudia M. Project Management for Mere Mortals. Pearson Education, 2007.*
- ✓ *Brookson, Stephen. Essential Managers: Managing Budgets. DK Publishing, 2000.*
- ✓ *Bruce, Andy, and Ken Langdon. Essential Managers: Project Management. DK Adult, 2000.*