



# UNIT-3

## The Event Planning Process

### Learning Outcomes

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

- ✓ Describe the event creation process and the phases involved in it.
- ✓ Understand the process of creating plans for events using milestones

## Unit 3

### The Event Planning Process

The best way to go about designing and organising events is to break them down into phases or stages. This enables the planner to tackle each phase more efficiently, in a timely manner and seamlessly from one stage to the next.

#### 1. Initiating

The event manager and the sales staff typically begin with the initial phases of an event.

#### 2. Planning

This is the most important aspect of the event management process. It involves making plans that detail how things should progress up to the time the event is completed. This stage also requires planners and staff to be aware of the order of activities and it should include contingency plans to deal with potential problems when they arise.

#### 3. Executing

This phase involves putting the event plans into action. This phase doesn't occur exclusively during the event; it begins as soon as the plan has been put into action.

#### 4. Monitoring

This needs to be carried out throughout the duration of the event by event personnel who are required to observe how the event is unfolding with guidance from the event plan.

#### 5. Controlling

Controlling is crucial as the event unfolds. It requires acting on observations made during the monitoring phase by taking decisions and making adjustments to the event plans in the face of the dynamic nature of event proceedings.

#### 6. Closing

This involves handing over the finalised 'product' to the client, which requires the client's signature. It is the process of passing the finalised "product" to the client. In the Event Management industry, the "product" includes the plans for the event, the performance of the event, and any correspondence ensuing after the event.

## Initiating

The event manager, sales representative, or event assistants may be required to undertake specific tasks to initiate an event. The extent of their involvement in performing these event initialisation tasks depends to a large extent on the level of experience and knowledge of the client. The initial contacts with a client may take many forms. The type and length of the communication depends on the size of the event, the client's level of experience with event planning, and the way in which the Event Management Company is organised. The less experience the client has, the longer the pre-event meetings will be. Your participation in these meetings might range from taking notes and answering questions to undertaking site visits and holding meetings with clients to explain the details.

### Typical Timeline of Client Contacts:

1. Email (Negotiations may not be necessary when dealing with experienced clients)
2. Phone call
3. Conference call
4. Meeting at Pre-conference meeting (Pre-con Meeting)
5. Site visits
6. Follow-up meetings
7. Pre-show meeting
8. Changes during the show approval
9. Closing communications

An RFP or initial conversation typically records this information:

- The contact detail of the client
- The purpose or goal of the event
- The background of the client
- The event profile
- Benefit to be gained from hosting the event
- How the client will be approached; directly or through a third party?
- Ways in which the client will participate in meetings
- Identity of person who will make final decisions
- Who should be chosen to approve changes to the event plan? Note down likely candidates
- Requirements of presenters (equipment etc.)
- The nature or type of event (conference or meeting and other specifications)
- The type of target audience to expect
- The number of staff to employ for the event

The duration for initiating an event is not fixed but varies depending on the level of your involvement as well as the level of assistance required by the client. It is not uncommon to have a half-day's meeting only to end up with a few answers to a host of questions. Nevertheless, the information obtained at the meeting is critical to planning a successful event.

## Planning and Executing

### Creating Plans

The ability to create comprehensive plans is linked to the amount and quality of the information supplied by the client. The planning phase is meant to help the event planners to devise plans which will guarantee the overall success of the project and meet the objectives of the event.

#### Scope Plan

This involves determining the number of guests attending the event and the amount of resources needed to get the event underway. Of course, one would expect the event manager to maintain a balance between the budget and the expectations of the client.

#### Cost Plan

With expert advice from the event management company, the client must decide on the amount of money to set aside for the event. The planner then creates the cost plan which constitutes the budget for the event. The cost plan includes all cost of resources and the contingency costs during the event.

#### Staffing Plan

When the event schedule becomes available, you can start deliberating on the staffing plan. To create a staffing plan, you should list all the activities due to take place and the skills required to accomplish them. Sometimes more than one person may be needed for a particular activity at a certain time. This information about the number and nature of activities will help you to determine the number of people you will need for the event and their respective schedules.

#### Quality Plan

Quality plans are designed to ensure an excellent quality of service is provided throughout the duration of the event. You should create a quality plan by listing the conditions needed to ensure the service will be of a high quality. For instance, you may assign a technician to all presenters during each session of the event. You should include in the staffing plan the technician with the skills to assist all of the presenters rather finding a new person to train for such a quality assurance role. This will ensure you receive value for money.

## Communications Plan

There needs to be a clear plan highlighting how communication activities should be carried out, and all persons involved in the event planning and execution need to know about this arrangement or plan. They must know who to contact when changes in plans occur during the course of the event.

## Risk Management Plan

Design a risk management plan containing a list of potential risks which may affect the event. Quantify and prioritise which ones have a high impact and outline steps to minimise or eliminate them altogether. The key to successfully dealing with risks is to maintain continuous monitoring of factors which may lead to risky or dangerous situations.

## Procurement Plan

Knowing the quantity of resources required for the event is important for developing an effective procurement plan. The procurement plan outlines items that need to be bought or rented in order for the event to begin. This plan also provides details of the mechanisms for procuring items and the date and time of delivery of items. Procurement plans provide the channel to compare costs of various vendors. They also require the signing of contracts, selecting the right vendors or making provision for the closing of contracts.

## Schedule Plan

No two events are ever the same; hence, schedules tend to differ for one event to the next. Whereas one event may indicate where and at what particular time to attend, others will only list what is expected of the planner and the schedule is left to him/her to formulate. The schedule plan must meet the objectives of all the activities: i.e. to ensure that everything runs smoothly and to meet the expectations of the client. In order to achieve these objectives, the planner should use the other plans mentioned above as guidelines.

## Monitoring

Monitoring and controlling tend to occur more frequently during the planning and closing phases. It is important to understand that the phase structure is not fixed for you to follow sequentially in executing activities. Rather, it has been structured to guide you to organise and execute activities in an efficient manner.

## Controlling

Controlling involves managing changes to the original plan when a new item is added or an existing item is taken from the original plan. This addition or subtraction is done to control the outcome of the event.

Successful management of a plan requires:

- Working within the scope of RFP
- Checking to ensure all resources are available onsite
- Reviewing all schedules before the event commences (i.e. operator schedule, equipment schedule, script, production schedule etc.)

## Closing

### **Cleaning begins**

This involves picking up litter, disposing it off at a central location and doing the laundry.

### **Clear away small items**

This involves the removal of all equipment by the caterer, technicians and other support staff.

### **Bump up equipment and furniture**

This is the removal of all equipment by caterers, technicians and media crew.

### **Cleaning and waste disposal**

Solid waste and recyclable materials are collected and tanks are emptied.

### **Removal of utilities**

This involves the removal of telecom wires and gadgets, electricity and gas supply lines, as well as temporary water supply etc.

### **Removal of structures**

This includes the removal of ropes and tents and the emptying of tanks.

### **Handover and site restoration**

Rubbish skips are removed from the site and final inspection is undertaken to ensure everything is in order. Damages are noted and repaired accordingly.

## Live Events Project Management and Budgeting

### Conducting a Site Survey

The client's requirements and expectations guide the event planning team and/or the audio-visual technician to develop a list of equipment for the event during the pre-event meetings. The audio-visual (AV) technician needs to visit the site several times to collect important information by conducting a site survey to avoid making mistakes during the actual event. The audio-visual technician is required to produce a specific equipment list from information obtained during the site survey. All equipment must meet the objectives of the client and should also be capable of performing all functions efficiently and effectively.

The initiating phase is the time to appoint someone who will be responsible for the approval of potential changes in the set-up. The audio-visual technician will need the contact details of the appointed person to enable them to decide on prompt changes when the need arises. It also helps to have the standard approval procedure in place before the event starts. This procedure must be explained to all the relevant staff.

Here is the list of items to consider during site survey:

- Get in touch with the site management and obtain their contact details
- Find out about the rules governing site facilities
- Enquire about vendor contract requirements
- Enquire about liability insurance
- Ask for the loading dock procedure to assess it and conduct a physical inspection of the site
- Examine all points of access to the venue and the areas surrounding the venue
- Measure the dock height and any ramp grades
- Determine whether you need ramps, a dock plate or lift trucks
- Ask about dock hour restrictions and security
- Find out about time restrictions for trucks
- Measure elevator door dimensions and interior space to establish accessibility
- Measure all doorways and hallways to verify accessibility
- Request a map of the building's interior to locate the ideal path to the event space and to select the best route for bringing in equipment
- Find out about the work schedule of security personnel and ask them about access to rooms
- Inspect the venue to determine the ceiling height, the sight lines, and locations of fire exits
- Understand the arrangement of the rigging point by talking to the riggers
- Understand the lighting controls and how to operate the lighting system
- The safe power distribution path must be determined
- Telecommunications should be tested. Provision of additional telecommunication facility can be arranged with a specialist

- If survey forms have been provided by your firm, you need to fill them out. Otherwise, take notes on things you observe at the site.

Site surveying is an important aspect of event planning which contributes significantly to the success of the event. It serves as a measure of how much equipment is required at the site and how to install it correctly. To ensure that no pertinent details are omitted during the survey, you will need to create a comprehensive checklist like the one above; this will help you avoid having to revisit the site frequently to obtain missing information.

## Site Survey Documents

### On-site Personnel Contact Information

1) Contact Name		3) Contact Name	
Contact Job title		Contact Job title	
Telephone		Telephone	
Email		Email	
2) Contact Name		4) Contact Name	
Contact Job title		Contact Job title	
Telephone		Telephone	
Email		Email	

### Typical Facility Rules

- Consumption of alcohol is not permitted
- No smoking
- Electronic recording devices are not allowed
- Tickets are not to be re-sold
- No selling of prohibited items at the site/venue
- Do not use inappropriate language or gestures
- Weapons are not allowed
- No animals except guide dogs

## Managing Client Expectations

- You will need to make contact with clients to build relationships with them
- The planner should know how to formulate personalised questions to gain a better insight into what the client really wants
- The planner's goal is to go beyond what clients expect but within the budget requirements
- Planners need to provide contact details for clients to contact them

- The planner should relay all good and bad news to the client to keep him/her updated
- You should provide prompt responses to clients' queries
- Communication channels to clients should remain open at all times, from first contact until the end of the event
- It is important to set limits and inform the client when you reach them.

Event planners must always maintain professionalism by opening a good and continuous channel of communication to the client and responding to all queries promptly and kindly. Even after the event, the planners need to maintain good communication with the client to obtain feedback on the event and to avoid the usual complaints from clients about event managers not communicating with them sufficiently after the event is over.

### Sticking to a Budget

As a planner, you must ensure that you work within the agreed budget and resist the temptation to go all out to meet the client's expectations in excess of what has been agreed. This can be achieved by having good communications and persuasive conversations with the client to tactfully point out the reality to him/her. The pre-event meeting provides the client with the opportunity to list all the equipment he/she needs for the event. You, on the other hand, can quickly use your company's price list to assign a price to each item of equipment and then add up everything to arrive at the final overall cost. Ensure your price matches the client's and inform the client about the overall cost before sending the invoice. This is a means of ensuring that their expectations are not astronomical.

### Scheduling

Your own schedule will form part of the overall schedule created by the client or the event organiser. Changes to their schedules must be reflected in your own schedule. This means that you must establish regular communication with the key decision-makers to monitor the latest developments to help you update your schedule to reflect any change or modification during the event. Schedules can be created with the help of the plans you have produced in the initial phase. Resources can then be allocated using the schedule to meet the expectations of the client as outlined in the plans.

### Creating Plans Using Milestones

List the milestones you must reach at the end of the event using all your plans as guidelines. The plans may include the scope plan, cost plan, schedule plan, quality plan, staffing plan, risk management plan, procurement plan etc.

Examples of Milestones:

- Equipment arrives for concert in main auditorium
- Equipment set up in main auditorium
- Modifications to the stage completed

It is important to identify and document all the activities that have to be executed.

For instance, you may note the following activities you want to accomplish:

- Transport equipment to the venue
- Set up equipment
- Operate equipment
- Dismantle equipment and transport it back to the warehouse

The above points are collectively known as the work packages. The extent will differ from one event to another depending on the scope of the schedule. For instance, if you want to schedule an event-planning process and sales activities, you will need to outline the work packages that are likely to be involved at this level before creating the schedule. Next, you should break the work packages into smaller manageable chunks and set a time for their completion as part of the scheduling. Sufficient time should be made available to complete each activity with the available number of people at the time specified.

### Possible Scheduled Activities:

- Retrieve equipment from warehouse
- Load the truck with the equipment and convey it to the venue
- Unload the equipment and store it at the right location
- Install equipment in the appropriate rooms
- Test all set-ups
- Assign roles to staff to operate equipment at specified times
- Assign roles to staff to uninstall equipment at specific times
- Return equipment to the warehouse and unload it

It is expected that each activity listed will be accompanied by its attributes; i.e. further details should be provided with each activity to give a more complete picture of exactly what is to be done.

### Site/Venue Layout and Design

After carefully selecting the site for the event, you will have to design a venue plan or a site plan with compass directions, a scale, and any popular landmarks for easy identification. The plan can be used as an

important aid to planning when communicating with suppliers, performers, emergency service personnel, event staff, stakeholders, guests and committee members. You may need to produce different types of site map to meet the needs of different groups involved in organising the event, including a simple one for guests, depending on the size of the site.

It is advisable to post a copy of the map on the event website to assist suppliers and delivery people in their duties. Many venues tend to make their site plans available to the event organisers, showing the locations of venue facilities such as the fixed seating area, the stage area, toilets, etc. Flexible staging and seating are available for hosting events at conference centres with computer-generated views of different arrangements available to choose from. Outdoor and park sites require a different approach to map the design and layout of the site; the event manager and his assistant must decide how and where activities should occur at the site. Usually, a sketch of the site and experimental positioning of activities and facilities will help the team to arrive at the most adequate placements. The general rule is to put similar activities together to achieve a compact site layout.

### Important Factors to Consider in Creating a Site Plan:

- Entrances for attendees and their proximity to transport and parking
- Good positioning of stage to allow unrestricted viewing of performance
- Availability of power and water for stage areas, catering and toilets
- Proximity of entrance to parking and other transport facilities
- Provision of shade and shelter
- Adequate pedestrian lanes for free movement of people
- Identification of areas of high participant concentration where revenue-receiving facilities can be positioned
- Provision of site access for deliveries and emergencies
- Positioning catering close to shaded areas
- Location of toilet facilities in convenient places and away from catering team
- Waste disposal facilities
- Signs showing directions
- Directional signage where necessary

### Selecting, Contracting and Managing Performers

Planners normally make arrangements to book 'headline' acts to attract people to the event because such performers are able to:

- Make the theme of the event attractive
- Make the event appealing to a large group of people

- Make the event lively and enjoyable
- Promote socialisation

## Checklist for Selecting and Managing Performers

- Identify the roles or functions that performers will serve at the event
- Decide on the budget for performances
- Research suitable performers and their availability, stage and equipment needs, fees, transport and accommodation costs
- Select performers who best fit the needs and budget for the event
- Negotiate carefully with performers or their agents on matters such as payment and when this will become due, times and lengths of performances and their contribution to the promotion of the event
- Draw up a performance schedule including the times and lengths of all performances and rehearsals
- Request a written contract and make sure that it correctly specifies the details of the performance
- Take careful note of any special conditions or 'riders' before signing
- Issue a booking form to all performers, whether free or paid, specifying performance details, arrival/rehearsal times and any special requirements that apply to the venue or event
- Draw up a stage plan that meets the needs of all performers
- Communicate the stage plan and performers' technical requirements in writing to the stage manager and sound and lighting suppliers prior to the event
- From the performance schedule, draw up running sheets for key stage personnel and performers, and post them on the walls of dressing rooms backstage
- Provide adequate backstage areas and dressing rooms, including toilets, clothes racks and mirrors
- Provide refreshments
- Make sure that performers are met and welcomed on arrival
- Ensure that they are well briefed on their role in the event
- Supervise sound checks and rehearsals
- Introduce the main performers to the compere and discuss how they are to be introduced on stage
- Thank them after the performance and ensure that they are paid promptly upon receipt of their invoice

## Negotiating and Contracting Performers

Recommended steps for choosing the best performers who will give good value for money include the following:

- Watch potential candidates perform at other events
- Conduct research about performers via their websites
- Invite potential performers to auditions
- Contact local clubs for their opinions
- Contact private entertainment agencies

When selecting suitable performers for events, try to contact their managers, who will be more than happy to supply you with their profiles or biographies as well as some of their previous work in audio or video formats. Also ask for fee details as well as the specification sheets for their stage requirements. This information will help you pick the most suitable performer(s) at an affordable price who can help meet the objectives of the event and who are willing to charge reasonable fees within your budget arrangements.

There are several key items to be aware of when it is time to initiate contract negotiations with the performer's agent. Be sure to state unambiguously in the contract what you require from the performer. Also discuss the fee and the mode of payment. Payment may be a proportion of ticket sales, a flat fee or a combination of the two. The norm is to provide an advance payment of a portion of the total amount of the fee and the remainder after the event. Sometimes the performer may require the provision of 'riders' as part of the contract. 'Riders' are the services the performer expects the event manager or planner to provide for free in addition to the contract fee. These include transportation, accommodation, hospitality, etc.

A performance schedule should be created to include the agreed format for rehearsals and sound checks. The role of the performer in promoting the event in the media in the lead-up to the event must be clearly specified in the contract. Conventional contracts are normally provided by the agent of the performer, highlighting the terms and conditions and the responsibilities of the event manager and the performer. You must read the contract carefully before signing it. If the agent of the performer is unable to supply a contract, you may have to create one, specifying all your requirements including the time, date and duration of the performance. Also include in the contract the insurance details and the mode and time of payment as well as details of liabilities for cancellation of the event. Tax issues should also be discussed and sorted out at the most convenient time.

It is good practice to issue a booking form to the performer. This form outlines what is expected of the performer and other guidelines and conditions to be followed when performing at the event venue. The booking form may also be provided to community performers as evidence of their performance at a community event.

### **Conditions and Guidelines that Might Apply to the Event:**

- Providing rules, ensuring adherence to restrictions and preventing unacceptable content and behaviour
- Provision for public liability insurance
- Making parking arrangements

- Making repairs to damaged property
- Making arrangements for cancellation or postponement
- Making arrangements for sound check and rehearsal
- Provision of contingency plans to deal with bad weather
- List of facilities to be provided including rooms, mirrors, ironing boards, etc.

## How to Stage the Event

During the hosting of events, a stage is provided for the performer to give all participants at the venue a good view of the performance. Staging also helps to provide a safe working environment for the performers. To further enhance the performance, lighting and sound are provided to create a good mood and atmosphere at the venue, particularly on the stage.

The concept of staging may be useful on occasions such as a school awards day or a prominent entertainment event featuring different groups of performers such as singers, dancers, variety acts etc.

A typical simple staging may require a raised dais and a loudspeaker. Complex staging, on the other hand, requires a larger stage, several loudspeakers, sound systems, lighting systems and sophisticated equipment. Regardless of the nature and size of the event, staging has a strong influence on its success or failure. You must pay careful attention to every detail and invest significant time and resources to ensure that everything works according to plan, especially with regard to staging. Excellent staging has the ability to enhance the theme and communicate the essence of the event to participants, as well as providing high-quality entertainment.

Some venues provide the stage and equipment while others, such as outdoor venues, may require you to construct the stage and supply the necessary equipment such as sound and lighting. Scaffold and wood flooring may be used to construct stages. Nowadays, it is not uncommon for people to rent mobile stages or to use the back of trucks to stage events. Sound and lighting technicians are required to operate sound and lighting equipment. You, as the event manager, only need to be familiar with the terms associated with this equipment. For example, you will need to understand terms such as:

- Single- and three-phase power
- Mixing desk
- Speaker stacks
- Old back speakers
- Lighting trees
- Lighting gels
- Spotlights
- Par cans
- Lighting trusses.

The event manager should talk with the performers to understand their exact requirements. To ensure everything goes according to plan, it is instructive to prepare a stage plan to guide the stage crew members to perform their duties effectively. The stage crew will be expected to provide the right equipment to the performers, ensure an uninterrupted supply of power, make adequate provision for the backstage area, ensure the availability of dressing rooms and manage rehearsal times. Creating a stage plan and a run sheet will serve the functions just described efficiently to ensure everything meets the expectation of the event manager and the client. Sometimes, if the workload is huge, the services of a stage manager may be required.

**When dealing with stage issues, the event manager will have to undertake the following duties:**

- Create a programme for speakers and performers
- Order the sequence of performers and speakers for contrast and high impact
- Arrange for proper stage decorations such as barriers, props, banners etc.
- Assess the size of the event to determine whether or not a stage manager will be required. Should the size of the event warrant a stage manager, you will have to discuss the subsequent steps below with him/her
- The event manager will have to determine the stage requirements of each performer and make arrangements for each of them. The set-up, stage area and equipment may differ from one act to another. These should be considered in the stage plan.
- The stage plan helps to determine the size of stage to use. You may be required to add an extension if an already existing stage is too small, or you may be required to modify the site plan to match the stage provided.
- Additional equipment needs may be taken care of by contacting potential suppliers for a quote. Ensure provision for backup items such as generators, extra light bulbs, etc.
- Adequate staffing for operating equipment and supervising and managing stage activities must be provided. Some firms may provide operators for sound and lighting systems.
- Adequate provision of support systems such as dressing rooms, refreshments for performers etc. should also be made.
- Stage safety should be carefully considered and measures put in place to ensure a safe working area. This includes taping and sealing cables and providing onstage security.
- A complete schedule for all aspects of staging needs to be created and it should include the arrival of equipment, setting up and testing of equipment, rehearsal, the actual event and uninstalling the equipment at the end of the event. Separate run sheets for performance, equipment operator and stage management should be created with the necessary details according to the requirements of these categories.
- Make yourself available to welcome performers and important guests and be ready to deal with any crisis or emergency situation.

**Further Reading:**

- ✓ *Risk Management for Events(2<sup>nd</sup> Edition), (2020), By Julia Rutherford Silvers, William O'Toole*
- ✓ *Impact Of ICTs on Event Management and Marketing, (2020), By Kemal Birdir, Derya Toksoz, Ali Dalgic, Sevda Birdir*
- ✓ *The Event Manager's Bible: The Complete Guide to Planning and Organizing a Voluntary And Oublic Event, (2020), By Des Conway*