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Effective Event Planning

Tips and Tools for Effective Event Planning

Whether you are planning to throw an annual dinner and dance, a fundraiser, a company picnic, a conference, exhibition, celebration or convention, event planning is not to be taken lightly. Company-wide events, no matter your industry or sector, can be well worth the effort, but require a great deal of planning and resources.

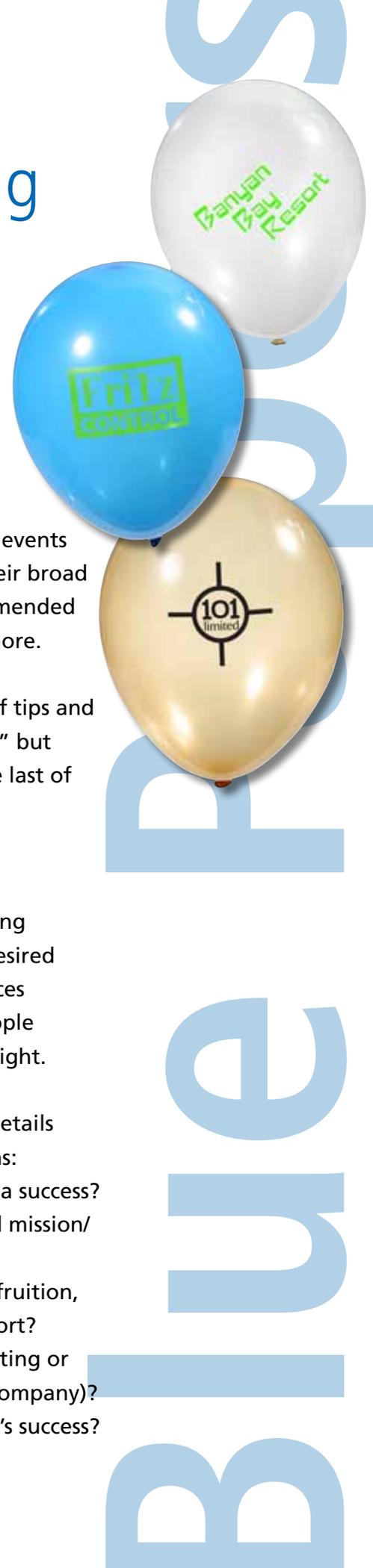
From thanking employees to improving customer relations, attracting new clients, educating the public, raising an organization's profile, celebrating achievements, and even launching a new product or service, events are wide ranging and can be tailored to fit any need. And because of their broad array, best practices for effective event planning vary widely, and recommended timelines for planning can range from short-term to twelve months or more.

Luckily, even if you are a novice at event planning, there are a number of tips and tricks you can use to make sure your event is not only "not to be missed," but creates the right kind of buzz long after the cleanup crew sweeps up the last of the confetti.

Goal setting

Events can be costly and time consuming, so if your company is considering throwing an event, it's vital for your organization to first establish the desired outcomes, and then consider whether a significant investment of resources is warranted. Event planning often takes more time and effort than people originally anticipate, and if you're going to do it, then you should do it right. So before you get to planning the colors of the table linens, the seating arrangements, the sound system, the space rental, and the many other details that make up an event, your team should answer some difficult questions:

- Is your organization ready to commit to making the event a success?
- Does the event reflect your organization's larger goals and mission/vision/values?
- Do you have the resources necessary to bring the ideas to fruition, or will you have to look outside the organization for support?
- Could the money be used more effectively on other marketing or promotions efforts (if the event goal is promotion of the company)?
- What is the end goal, and how will you measure the event's success?



If you've been charged with leading an event planning effort, you will want to consider the following questions as you begin constructing a plan.¹

- What are the objectives?
- What are the cost implications - is there a budget?
- Who is your target audience?
- Where is your client base?
- Is there an event theme, if so, what?
- Do you need an event sponsor?
- Will entertainment be needed?
- What are the timelines, and are they realistic?
- Who else is planning to attend?



Getting started

Once your organization weighs the desired outcomes against the resources available and the necessity/desire to hold an event and decides to move forward, the next step is to determine whether you want to hire a professional event planner. Under what circumstances is hiring a professional event planner warranted? Experts suggest considering the following factors:

- **You want to host a large number of people.** Obviously, a small event, like movie night at su casa is far different than planning a catered dinner at The Plaza. Just how ambitious is your event? The more guests you anticipate, the more detailed your event needs to be, and the greater the scope of the project, the more likely it is that you will need a professional event planner. If you've never planned a corporate event, but you planned your own wedding, you are aware that "the devil is in the details." Many conference centers and hotels have professional event planners at your disposal to take the pain out of planning. There are also independent party planners outside of those venues, people who know, for example, who to contract if the disc jockey double books that night, or where to get the perfect promotional goodie bags.
- **You are expecting many children as guests.** Perhaps you're hosting a company picnic or a family night for your team. Taking care of a large number of children can and will take up much of your time. An event planner can help you either cater the event to the children's needs and keep them entertained, or hire a childcare service to handle the situation. If the goal of your event is to spend some quality time with young mothers to interview them about your product, the offer of

¹ "Guide to Effective Corporate Events Planning - from KayDeeElle." UK Themed event design ideas for corporate and private events - KayDeeElle. 12 July 2009 <<http://www.kdl.to/guides/corpevntpln.htm>>.

complimentary childcare could be the incentive you need to get more moms in the door.

- **You want to hold an outdoor event.** Mother Nature doesn't usually get the memo about your event. If thunderstorms break out the afternoon of your client appreciation barbeque, and you don't have a backup plan, disaster ensues. However, a good event planner will have a plan B in place and will be ready to launch into event rescue mode at a moment's notice. If you decide to hire the services of an event planner, be sure as you interview candidates that you establish how they have handled such last-minute emergency event changes due to weather.
- **You need ideas.** The well is dry. You know how it goes: every year you host the same volunteer breakfast. Every year the company holiday party is held at the hotel ballroom down the street and you give away t-shirts. If your events have gotten old and uninspired, if even you aren't interested in going, it may be time to tap into the brainpower of an event planner. A party planner can brainstorm fresh ideas and even a theme for your event.
- **You just aren't an organized person.** Time for some navel gazing. Event planning is not for everyone. If you're a so-called "big picture" person, if you tend to lose sight of the details, event planning may not be for you. Events, particularly large events, are riddled with details, small and large. An event planner can help you manage the project particulars, from invitation development to timing to contingency plans to the color of the napkins and the centerpiece design. If thinking at such an intense level of detail makes you break out into hives, or if you have concerns about balancing the responsibility with the number of tasks you have on your to do list on a daily basis, it may be time to accept your shortcomings and hire a planner.
- **You want to spend as much time as possible with your guests.** Why bother throwing a customer or employee appreciation party if you don't have any time at the event to appreciate them in person? For some people, arranging the canapés is a good time. Others would far rather mingle and join the fun of the day's events. As an event planner, you become the point person for every little detail of the event. When you hire an event planner, they become the point person. If being on duty the night of your dinner party doesn't sound like your idea of fun, pour yourself a cup of punch, sit back and relax while the genius event planner you hired takes care of the details.²



² Roberts, Caroline. "Should You Hire an Event Planner for Your Next Party?" 12 July 2009.

Taking the lead

Maybe your organization can't or won't foot the bill for an event planner. Maybe you'd rather take the reins yourself. At any rate, it's time to take the lead and begin planning your event. But where to start? First of all, it's important to begin your planning process early enough to allow sufficient time for the event to go smoothly. One of the most common mistakes made by novice event organizers is the failure to allow enough time for effective event planning. Some experts recommend event planning begins as much as a year in advance, depending on the size and scope of the event. This may seem like a long lead time, but keep in mind you must also consider other factors such as:

- event competition
- the schedules of your attendees
- availability of venues and suppliers
- deadlines set by vendors
- lead times required for ordering, printing, reserving and shipping
- sending of invitations and "save the date" information³

Of course, establishing a six-month or one-year lead time doesn't necessarily mean you'll be on a dead run of event planning the entire time. The level of dedication required of you to the project will ebb and flow over the timeline of the project. "The initial planning stages are usually the busiest. This will be followed by a quieter period, which predominantly involves overseeing things to ensure the project is running to plan and budget. Activity then increases again three to four weeks before the event."⁴

In their book, *Event Planning Made Easy*, Paulette Wolf, Jodi Wolf and Donielle Levine say the first step to planning a successful event is to establish the five W's and the "how":

- 1) **Who are your guests?** This, say the authors, will play a huge role in determining how you design your event. Start by determining age groups you are hoping will attend, couples or singles, families, men or women, whether the guests are strangers, local or from out of town, or work associates.
- 2) **What is your event?** This will help you style your event. A business meeting or conference has very different logistical requirements than a company picnic.
- 3) **When is your event?** The authors say you may not have this answer immediately, and that's okay.



³ "Guide to Effective Corporate Events Planning - from KayDeeElle." UK Themed event design ideas for corporate and private events - KayDeeElle. 11 July 2009 <<http://www.kdl.to/guides/corpevntpln.htm>>.

⁴ *Ibid.*

- 4) **Where is your event?** Not knowing where your event will be held is a normal part of the process.
- 5) **Why is this event happening?** Focus on the purpose of the event and you will find the appropriate direction in planning.
- 6) **How much money is in the budget?** An important consideration, determining a budget can be a difficult step for most event organizers. By establishing how much you can spend, you have set a bottom-line that cannot be crossed.⁵ Don't forget to factor in publicity and printing costs, materials, staffing, food, gratuities, insurance, transportation, labor and rental equipment in addition to the cost of the selected venue. The list of possible cost-incurring items is long; be careful not to underestimate it, and be flexible in order to achieve your goals.

Establishing the specifics

The next step in event planning is to address the particulars, including the timing of your event. Consider reviewing community calendars to determine whether there are other events set for the days you are considering which would post a conflict for your desired attendees. In addition, conflicts with large-scale conferences, trade shows or other events can make it difficult for out-of-towners to find lodging.

Also consider where you want your event to take place, within the constraints of your budget. "Your location choice will have a direct and significant effect on your bottom-line budget. From the up-front charges, such as a venue fee, to unseen logistics costs, such as providing your own power, the venue will dictate every single line item in your budget."⁶ You may consider hosting the event on your own or company property, because it seems "free." However, keep in mind you will need to provide everything for the festivities, including chairs, tents, tables and dishes. In the end, once you consider renting all necessary supplies and the extra time and effort it takes to do so, you may find it's easier and cheaper to rent a space for your event. The choices are many: hotels, restaurants, convention centers, warehouses, libraries, parks, museums, beaches and sites of historical interest are just a few places you may want to choose from for your next event.



⁵ Wolf, Paulette, Jodi Wolf, and Donielle Levine. *Event Planning Made Easy*. New York: McGraw-Hill, 2005.

⁶ *Ibid.*

Space and seating

While it may seem like a small matter, seating and space are important considerations. Ever walked into a room and found it difficult to pull your chair out far enough to squeeze in to? Feel like you're bumping into everyone at the cocktail hour? No place to set your food or drinks? All of these relate to poor space planning. "One of the most common mistakes in planning corporate banquets, buffets and social events is to fail to leave enough room for comfortable seating or standing. That mistake, alone, can ruin an otherwise successful event."⁷ Trying to estimate space needs on your own could be a real headache. Thankfully, some experts have already done the math! Although any conference facility should be able to help you estimate your space needs for your event, here are some general guidelines for table selection and seating capacity.

- 1) Pedestal cocktail tables: 24" round - 36" round will each seat two to six people, depending on the intended use.
- 2) Card tables: 30"x 30" can each seat four people comfortably.
- 3) Banquet tables: 6'x 30" seat six to eight people, 8'x 30" seat eight to 10 people.
- 4) Round tables: 48" seat six to eight people, 60" seat eight to 10 people and 72" seats 10-12 attendees.



General guidelines also exist for space needs for the number of people you intend to host at your event.

- For cocktail parties with guests standing, expect to have five to six square feet per person. For similar parties with some guests seated, allow for eight square feet per person.
- For dinner using oblong tables, allow for eight square feet per person. If using round tables of six to 12 guests, allow 12 square feet per person.
- For cathedral seating, allow six square feet per person.
- For dancing, plan to provide two to four square feet per person. That is, unless someone really busts a move. You know who you are.

There's more. Space allowance between tables is important, too, so if you're involved in table arrangements for your event, consider the following:

- For banquet style seating arrangements, allow 54" between round tables for chair space and room for the servers to navigate the area. Allow 60" between oblong tables when seating is back to back.

⁷ "Seating & Space Capacity Planning." *Party Planning Ideas Party Planning Made Easy*. Party advice. 11 July 2009 <<http://www.party411.com/corp-guide1.html>>.

- For classroom or theater style seating, when food is not being served and seating is on one side of the table, be sure to allow 36" between tables.

How many people can your room accommodate? Apply these general formulas for the maximum number of people:

- For oblong tables: divide the square footage of the room by eight.
- For round tables, divide the square footage of the room by 10.
- For classroom style seating: divide the square footage of the seating area by eight.
- For theater style seating: divide the square footage of the seating area by six.

Choosing vendors

It may seem an insurmountable task. Short of closing your eyes and pointing to vendors in a phonebook, how do you begin to know who is right for your event with your particular needs? Consider these steps:⁸

- 1) Keep your eyes and ears open. When you attend parties and events, take note of what you love and what you don't particularly like. If you hear a great band, request a card. If you love the flowers in a restaurant, get the florist's name and number. Chances are you'll amass a list of vendors whose work you appreciate in no time.
- 2) Ask your other vendors for recommendations. Who better than your trusted caterer to recommend a florist whose work they like?
- 3) Read regional publications. Look at social magazines, lifestyle publications, women's magazines and wedding guides.
- 4) Look for people you enjoy working with. Go with the person who makes your job easier. It just makes sense to work with people you like, and people with whom you enjoy a great working relationship.



As you narrow down your list of vendors, gather key information so you can compare each organization's offerings. Inquire about contract specifics, such as terms of payment, overtime charges, what is supplied and isn't, and what kind of timelines the vendor has established. Be sure to also inquire about certificates of insurance for your protection and the protection of your event.

Experts also say it's important to keep in mind that you can negotiate with suppliers for better pricing or creative solutions to staying on budget. Every business, from airlines to caterers to promotional companies, transportation companies and restaurants, may be

⁸ Wolf, Paulette, Jodi Wolf, and Donielle Levine. *Event Planning Made Easy*. New York: McGraw-Hill, 2005.

willing to negotiate. While suppliers have to pay attention to their costs as well, there may be wiggle room if you maintain flexibility. "In off peak times, they will be more willing to bend rates or offer value-added features. Wonderful pricing breaks may be available to clients if they can shift the date and time of their event. The time of day, the day of the week, the month, the time of the year the event is taking place and even the time of year the request is put in, play an important part in pricing and what can and cannot be done."⁹

Creating an event blueprint

An event blueprint can help organize all of the information you have gathered to this point and all of the paperwork that will be coming your way. This should be contained in a single easy-to-access format and can include:¹⁰

- Contact Sheet
- Correspondence
- Operations
- Décor
- Venue
- Guest Lists
- Seating plans
- Transportation
- Timelines
- Contracts
- Budgets
- Food and Beverage
- Insurance
- Floor Plans
- Sound and lighting
- Expenses
- Notes



Timelines

With any sizeable event, establishing and adhering to detailed timelines can keep your project and planning on task, on budget and on time. The following list, while not exhaustive, can be helpful in helping identify tasks related to your event.¹¹ Customize this list to your particular needs. You may wish to break this out into a task list which can be distributed to members of your committees and subcommittees and assigned to specific individuals.

Six to 12 Months before event

- Decide on the event purpose. Is it to celebrate, promote, entertain, recruit or something else?
- Choose a theme for your event, if appropriate. Brainstorm ideas that are aligned with the purpose of the event, the type of people you want to attract to the event, and your organizational values.

⁹ Judy Allen. *The Business of Event Planning: Behind-the-Scenes Secrets of Successful Special Events*. John Wiley & Sons Canada Ltd., 2002.

¹⁰ Wolf, Paulette, Jodi Wolf, and Donielle Levine. *Event Planning Made Easy*. New York: McGraw-Hill, 2005.

¹¹ "Event Planning Checklist." *Event Planners at TheGreatEvent.com: Plan an Event, Corporate Event Planning, Party Planning, Company Picnic Planning, Meeting Planning, Team Building, Event Planners*. 11 July 2009 <<http://www.thegreatevent.com/content/ap.asp?id=4>>. and Wolf, Paulette, Jodi Wolf, and Donielle Levine. *Event Planning Made Easy*. New York: McGraw-Hill, 2005.

- Visit potential venues.
- Research and appoint an event coordinator or hire an external vendor.
- Research and select committees and event chairs as needed.
- Form subcommittees.
- Expenses: get bids and cost estimates for the following:
 - site rental
 - food
 - drink
 - sound/lights
 - entertainment
 - for decorations
 - design and printing
 - other major items
- Consider budget needs.
 - finance committee drafts initial budget
 - decide on admission cost
 - create sponsorship amounts/levels
 - list items to be underwritten and possible sources
- Research and approach honorees.
- Invite and confirm VIPs.
- Compile mailing lists for both individuals and businesses.
- Choose a date. Check proposed date for potential conflicts. Hold dates at several potential desired venues.
- Get written contracts for site, entertainment, rentals, catering, floral design, photography, etc.
- Determine need for credentials for VIPs, media, event organizers or others.
- If event is larger than 750 guests, consider hiring an emergency medical team.
- If high profile individuals or celebrities are taking part, consider hiring a security firm.
- Develop alternative site if event is outdoors.
- Identify promotional needs.
 - Brainstorm promotional channels: media, marquees, school newsletters, church announcements, and cable and commercial stations. Make a detailed list with names of whom to contact and when.
 - Consider pre-party event for publicity or underwriting.
 - Select graphic artist; begin invitation design.
 - Create logo for event, if necessary, with graphic artist.
 - Design and order "hold the date" cards or other event announcements.
 - Set marketing/public relations schedule.
 - Develop press release and calendar listings.
 - Select photographer; arrange for photos of VIPs, chairmen, honorees.



- Get biographical information on VIPs, celebrities, honorees, chairmen.
- Investigate need for special permits, licenses and insurance.

Three to Six Months before event

- Begin monthly committee meetings.
- Write and send requests for funding or underwriting to major donors, corporations and/or sponsors.
- Promotion:
 - request logos from corporate sponsors for printing review with graphic artist invitations, programs, posters and other printed items
 - finalize copy for invitations, return card, posters
 - finalize copy for tickets
 - finalize mailing lists for invitations
 - order invitations, posters, tickets, etc.
 - obtain radio/TV sponsors, develop public service announcements, promos
 - determine signage needs
- Sign contract with entertainment company.
- Order credentials.
- All vendor contracts should be signed and deposits distributed.
- Make list of locations for poster distribution and display.
- Set menu with caterer for food and beverages.
- Secure permits and insurance.
- Get written confirmation of celebrity participation/special needs.
- Finalize audio/visual contract.
- Send save-the-date cards.
- Select and order trophies or awards, as needed.
- Refine budgets.
- Finalize floor plans.
- Begin drafting program.

Two Months before event

- Hold underwriting or preview party to coincide with mailing of invitations; invite media.
- Assemble and address invitations, with personal notes when possible.
- Mail invitations.
- Distribute posters.
- Finalize transportation and hotel accommodations for staff, VIPs, honorees.
- Obtain contracts for decorations and rental items.



- Confirm TV/radio participation.
- Release press announcements about celebrities, VIPs, honorees.
- Follow up to confirm sponsorships and underwriting.
- Review needs for signs at registration, directional, etc.
- Hold walk-through of event with responsible committees, chairpersons and staff members at event site.
- Review and finalize:
 - budget
 - task sheets
 - tentative event timeline
 - printed event programs
- Start phone follow-up for table sponsors.

One Month before event

- Follow-up as needed with potential attendees from mailing list.
- Place newspaper/print ads.
- Follow up with news media.
- Taste-test menu items.
- Confirm staff for registration and responsibilities.
- Request necessary proof of insurance from vendors.
- Pinpoint security issues, if any.
- Have all giveaways ready.
- Develop a questionnaire for event participants to evaluate the program.
- Address VIP, program participant needs:
 - write to VIPs, celebrities, and program participants to confirm participation
 - complete list of contents for VIP welcome packets
 - confirm transportation schedules: airlines, trains, buses, cars, limos
 - confirm hotel accommodations
 - prepare transportation and accommodations (include arrival time, flight number, airline, person assigned to meet flight)
 - confirm special security needed for VIPs, event
 - prepare welcome packet for VIPs, chairmen, and key staff
- Get enlarged site plan/room diagram, assign seats and tables.
- Arrange speaker platform.
- Continue phone follow-ups for ticket and table sales.
- Give estimate of number of guests expected to caterer.
- Meet with all outside vendors and consultants to establish event day expectations.
- Review script and timeline for day.
- Schedule deliveries of special equipment, rentals.



- Confirm setup and tear down times with event site.
- Finalize plans with party decorator.
- Give caterer revised numbers.
- Meet with chairpersons and key staff to finalize any of the above.

One Week before event

- Meet with all committees for last-minute details.
- Finish phone follow-ups.
- Confirm number attending.
- Finish seating/table arrangements.
- Hold training session with volunteers; finalize assignments.
- Secure two or three volunteers to assist with emergencies.
- Finalize registration staff.
- Distribute seating chart, assignments to hosts/hostesses.
- Schedule pickup or delivery of any rented or loaned equipment.
- Double-check arrival time and delivery times with vendors.
- Reconfirm event site, hotel, and transportation.
- Deliver final scripts/ timelines to all program participants.
- Finalize catering guarantee, refreshments.
- Confirm number of volunteers.
- Make follow-up calls to news media for advance and event coverage.
- Distribute additional fliers.
- Final walk-through with all personnel.
- Schedule rehearsals.
- Establish amount of petty cash needed for tips and emergencies.
- Write checks for payments to be made for the day of the event.



Day before event

- Recheck all equipment and supplies to be brought to the event.
- Have petty cash and vendor checks prepared.

Event day

- Arrive early.
- Distribute communications and credentials to staff and crew. Communications should include a contact sheet, a loading schedule, an event timeline, a floor plan and menu.
- Unpack equipment, supplies and make sure nothing is missing.
- Be sure all VIPs are in place and have scripts.
- Reconfirm refreshments/meal schedule for volunteers.
- Go over all the final details with caterer and setup staff.

- Check with volunteers to make sure all tasks are covered.
- Setup registration area.
- Check sound/light equipment and staging before rehearsal.
- Have all services and setup complete prior to guest arrival.
- Hold final rehearsal.

After the event

At the conclusion of your event, you will likely need to generate a final budget and send out any lingering payments. Whew! You're done! Oh, wait a minute ... no event is complete until you've evaluated the results and send out thank you notes. And though you may, by this point, be ready to close the blueprint on this event, it is best to evaluate your efforts while the details are still fresh in your mind. If you have developed a questionnaire for participants to fill out, examine the results. Is the feedback positive or negative? What sort of informal feedback did the group receive? Discuss with the planning committee whether the event fulfilled its goals and objectives. Identify what worked and what could have been improved upon. Are there vendors you would or would not use again? How was attendance to the event? When you consider all of the work that went into planning the event, as well as the expense, was it worth doing?

You will want to identify areas for improvement. Ask your committee to evaluate the many facets of the event. Were the vendors on time? How was the sound and lighting quality? Was there sufficient security? What would you do differently next time? With the completion of such a major project, it's important to also celebrate your successes. Even if you walk away from the experience of event planning feeling that you have an opportunity for improvement, and let's face it, every event could use improvement of some sort, the process itself is one through which you stand to learn and grow.

And, remember as your final act to thank others who contributed to the process, including vendors, and celebrate your own success, as well.

