



# **Event Planner Certificate Course**

## **Course Overview and Outline**

This Course Overview and Outline, along with the e-book version of the Textbook and the Welcome Letter that you previously received, include all of your course materials and you are now ready to begin your self-directed course. Please ensure that you have read the Welcome Letter then review the information below and then you can start on the tasks set out below for Week 1. Next week you can complete the tasks for Week 2, and so on. To confirm, you have now received all the materials to start this course and work at your own pace.

## **Course Objectives**

In this course you will learn basic principles and practical techniques for planning events and getting started in a career as a professional event planner.

You will learn: what an event planner does and how to plan an event, how to develop your skills to succeed in an event planning career, how to get hired for a job as an event planner, and how to start your own event planning business and get clients.

## **Required Text**

The required text for this course is *FabJob Guide to Become an Event Planner* (2014 edition), by Jan L. Riddell, Carol Palmatier, Tag Goulet, and Peter J. Gallanis, published by FabJob Inc.

When you ordered the course you received a link to download the current (2014) edition of this textbook in e-book format. If you own an older version of this textbook in print, you may use it, however, we do recommend using the 2014 e-book edition of this textbook because the course outline follows along with the page numbers in the 2014 e-book version of the textbook.

## Educational Approach

This course is an online learning program with suggested readings and course assignments as described in this course outline. This course is self-directed, which means that students may study and complete assignments at times that are most convenient for each student. This part-time course has a recommended completion date of 6 weeks from the start of the program, however, students may choose to complete the course in as little as 4 weeks or as long as 12 weeks, depending on the student's schedule.

## Learning Assistance

The course has been created to allow you to complete it without any learning assistance. If you require assistance or have questions about the course content, you may submit questions by email or talk with a faculty member by Skype (free online video or voice calls through [www.skype.com](http://www.skype.com)) for up to one-half hour per week for six weeks.

The faculty member for this course may be contacted by email at [faculty@fabjob.com](mailto:faculty@fabjob.com) or by phone at 403-873-1018 (messages). Faculty members aim to return messages within 24 hours on weekdays and weekend assistance may also be available depending on each faculty member's schedule. Skype calls may be scheduled at times that are mutually convenient for both the student and faculty member.

Please be aware, when booking an appointment with your Faculty Member, if you need to cancel or reschedule you must notify your Faculty Member by emailing [faculty@fabjob.com](mailto:faculty@fabjob.com) at least 24 hours in advance of the scheduled time. Except in case of serious illness or emergency, each later cancellation or missed session will count as 30 minutes of time with the Faculty Member. If you must miss an appointment due to serious illness or emergency, please contact [faculty@fabjob.com](mailto:faculty@fabjob.com) as soon as you are able.

## Assignment Grading Distribution

Assignment	% of Total Mark	Recommended Completion Date
Final Exam	100%	December 29 (6 weeks after course starts)

As mentioned above, students may choose to complete the course in as little as 4 weeks or as long as 12 weeks, depending on the student's schedule. Assignments may be completed whenever is convenient for you and submission is not required.

If you choose a different course completion date, you can change your Final Exam date to suit your schedule. It is not necessary to get permission from the college to do so; your exam will be marked when it is submitted.

When you are ready to write your Final Exam, contact IAP Career College at [iapcollege@fabjob.com](mailto:iapcollege@fabjob.com) for a link to the exam and an access code.

## Grades

Your final grade will be in percentage form. International Association of Professions Career College has established the following guidelines for grade distribution. A grade of 60% or higher is required to earn a certificate.

90 to 100%	A+ – Honors
80 to 89%	A – Excellent
70 to 79%	B – Good
60 to 69%	C – Satisfactory
50 to 59%	D – Needs Improvement
0 to 49%	F – Fail

## Final Exam

Worth 100% of Final Mark  
Suggested Date to Take By: December 29

When you are ready to take your Final Exam, contact the college by email at [iapcollege@fabjob.com](mailto:iapcollege@fabjob.com) for a link to your test and an access code.

To assist you in doing well on your Final Exam, it is recommended that you study the weekly Review Questions below.

# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 1

This week you will begin learning about the profession of event planning. You will look at what an event planner does, specializations and how to plan an event.

## Tasks

- Complete the week 1 readings from Chapters 1 and 2 as indicated below
- Answer the week 1 review questions
- OPTIONAL: Schedule your first half hour session with your faculty member

## Readings

Completion	Topics	Reading
November 24 (week 1)	<b>Introduction to Event Planning</b>  Welcome to Event Planning <ul style="list-style-type: none"><li>• Event Planning as a Profession</li><li>• Benefits of This Career</li></ul> <b>What an Event Planner Does</b>  Services and Specializations <ul style="list-style-type: none"><li>• Social Events</li><li>• Corporate Events</li><li>• Industry Events</li><li>• Special Events</li></ul> Preliminary Steps to Plan an Event <ul style="list-style-type: none"><li>• Consult with the Client</li><li>• Set Objectives</li><li>• Choose a Date</li><li>• Decide Who to Invite</li><li>• Create Your Theme</li><li>• Set the Event Agenda</li></ul>	Chapter 1 pages 12 to 16          Chapter 2 pages 18 to 51

### Get Organized

- Establish an Event Committee
- Timeline Schedule
- Budgets
- Crisis and Backup Planning
- The Rehearsal

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. You do not need to submit your answers to the review questions. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 1 Review Questions

**1. What is expected to have a major impact on the event planning industry?**

- a. Globalization
- b. Virtual meetings
- c. The expanding role of event planners
- d. All of the above

**2. Event planners are forecast to earn what percentage of their income from Social Events?**

- a. 10 percent
- b. 25 percent
- c. 35 percent
- d. 55 percent

**3. When planning an event for a corporation, it is important to pay careful attention to:**

- a. The CEO
- b. The corporate culture
- c. Following your unique vision for their event
- d. The event budget

**4. At the end of an initial event consultation with a client, you should be able to:**

- a. Record details of the event, to include party favors; centerpieces; music; etc.
- b. Select appropriate vendors for the event
- c. Establish a vision or "mission statement" for the event
- d. Finalize the budget for the event

**5. You are planning a fundraising event for a non-profit and have determined that a goal is to have 1,000 attendees. Which of the following S.M.A.R.T. criteria does this fulfill?**

- a. S = Specific
- b. M = Measurable
- c. A = Attainable
- d. R = Relevant

**6. If an event is privately hosted and the guests are known to the host, approximately what percentage of the guests invited will NOT show up?**

- a. 5 percent
- b. 10 percent
- c. 15 percent
- d. 25 percent

**7. When forming an Event Committee, the role of event Chairperson should go to:**

- a. Someone with the ability to make decisions
- b. Yourself
- c. Someone who can help focus the work of the committee
- d. Both a. and c.

**8. When planning an event budget, what should you remember to include in your calculations to offset event costs?**

- a. Profits
- b. Revenue
- c. Tips
- d. Both a. and c.

**9. When putting an event's crisis response team together:**

- a. Decide who will handle communications with emergency personnel, the press, etc.
- b. Put together the team on the day of the event and make a plan
- c. Do a run through of a staged emergency
- d. Both a. and c.

**10. When securing permission or permits for an event, you should:**

- a. Get permits squared away as soon as possible
- b. Make sure you get permission in writing
- c. Understand local ordinances and procedures
- d. All of the above

## Answers to Review Questions:

### Week 1 Answers

1. (d) Globalization is expected to have a major impact on all areas of the event planning industry. Also expected to impact the industry is the growth of virtual meetings, and the expanding role of event planners in this new area of the market. [p. 14]
2. (c) According to *Special Events Magazine*, event planners were forecast to earn 35 percent of their income from social clients. Even if you plan to focus on corporate events, you may find your corporate clients turning to you to plan social events for their companies or themselves personally. [p. 20]
3. (b) When planning an event for a corporation, it is important to pay careful attention to the corporate culture. For example, employees of an Internet company celebrating their IPO are unlikely to respond well to a formal suit and tie affair, while a group of international financiers will probably not be comfortable at an indoor luau. [p. 21]
4. (c) At the end of the initial consultation with a client, you should have a clear picture of what your client envisions for their event and be able to form a clear, concise “mission statement.” [p. 24]
5. (a) The goal of 1,000 attendees falls under “S” or Specific of the S.M.A.R.T. criteria. Examples of Measurable might include total funds raised; Attainable may involve whether you have adequate time to plan; and Relevant could mean the event itself aligns with the mission of the nonprofit [p.s. “T” or Time-based, refers to a specific start and end point for a goal. [pp. 26-27]
6. (d) Generally, industry insiders will tell you that if the event is privately hosted and the guests are known to the host, 25 percent of the people invited will **not** show up, even if they have responded that they will attend. When guests are paying to attend the event, the number of “no shows” drops to approximately 15 percent. [p. 29]
7. (d) You’ll be on the committee yourself, but don’t name yourself as the Chairperson. That role should go to someone with the ability to make decisions; get people to agree; and help focus the work of the committee. [p. 32]
8. (b) When planning the budget, don’t forget to include your potential revenue to offset the costs. Attendance fees, sales of related materials, donations, ticket sales and sponsorship can all be good ways to raise revenue. [p. 44]
9. (d) Prior to the day of the event, put together a crisis response team and develop a plan. Include venue staff and local emergency response officials, and decide who will handle communications with the emergency personnel, the press, the attendees and other key groups, and do a run through of a staged emergency. [p. 49]

10. (d) Make sure you get written permission and permits squared away as early in the process as possible. Outdoor events taking place in public areas like parks will need to be cleared through the city; also, be sure you understand local ordinances and procedures.  
[p. 50]



# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 2

This week you will continue about what an event planner does. You will look at venue and vendor considerations, marketing and what you need to do during and after the event.

## Tasks

- Complete the week 2 readings from Chapters 2 as indicated below
- Answer the week 2 review questions
- OPTIONAL: Schedule your next half hour session with your faculty member

## Readings

Completion	Topics	Reading
December 1 (week 2)	<b>What an Event Planner Does (cont.)</b>  Venues <ul style="list-style-type: none"><li>• Finding a Venue</li><li>• Space Requirements</li><li>• Creating an RFP</li><li>• Site Inspection</li><li>• Site Confirmation</li><li>• Pre-Event Meeting</li></ul> Vendors <ul style="list-style-type: none"><li>• Types of Vendors</li><li>• How to Find Vendors</li><li>• Choosing Vendors</li><li>• Vendor Contracts</li><li>• Tips for Specific Types of Vendors</li></ul> Marketing <ul style="list-style-type: none"><li>• Advertising</li><li>• Publicity</li><li>• Sponsorships</li></ul>	Chapter 2 pages 52 to 99

Event Day

After the Event

- Event Evaluations
- Other Activities

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 2 Review Questions

**1. For a theater style room layout, allow about \_\_\_\_\_ square feet per event participant.**

- a. 2
- b. 5
- c. 10
- d. 20

**2. For stand-up receptions, allow \_\_\_\_\_square feet per person.**

- a. 2 to 3
- b. 3 to 5
- c. 5 to 10
- d. 10 to 20

**3. Make sure the event contract is between:**

- a. You and your client
- b. The primary vendor and the venue
- c. You and the venue
- d. The venue and your client

**4. When choosing suppliers for events, solicit \_\_\_\_\_for each service.**

- a. Your favorite supplier
- b. At least two suppliers
- c. At least five suppliers
- d. The lowest cost suppliers you know

**5. For most event vendors, which of the following is critical?**

- a. A letter of understanding
- b. A signed quote

- c. A contract
- d. A spec sheet for the product you've chosen

**6. Typical lead times for booking travel arrangements for a domestic event location are:**

- a. 1 to 3 months
- b. 3 to 6 months
- c. 6 to 12 months
- d. 8 to 18 months

**7. You can reduce food costs at conferences by:**

- a. Eliminating the mid-morning break
- b. Eliminating the afternoon break
- c. Offering less-expensive options for the breaks
- d. Both a. and b.

**8. What is the typical fee for a music license for copyrighted music at a special event?**

- a. 5 to 6 cents per attendee
- b. \$1 per minute for the duration of the event
- c. \$50 - \$500 per piece of copyrighted music
- d. \$750 flat fee per event

**9. Which of the following is a one-page document which you can fax, email or mail to invite the media to your event?**

- a. A media advisory
- b. A press release
- c. An event calendar
- d. A billboard

**10. Which of the following methods of contact is more likely to result in a sponsorship for your event?**

- a. A phone call
- b. A personal meeting
- c. An email
- d. Mailing a written proposal

## Answers to Review Questions:

### Week 2 Answers

1. (c) A room laid out in theater style (chairs only), will allow you to fit at least twice as many people into a room as classroom style (tables and chairs). For theatre style, choose a room that allows about 10 square feet per participant; for classroom style, the room should have about 20 square feet per participant. [p. 55]
2. (c) Allow 5 to 10 square feet per person for stand-up receptions. Also, make sure to have tables arranged around the room for people to deposit empty drink glasses and dishes. [p. 55]
3. (d) Make sure the contract is between the venue and your client, not between the venue and you. If you enter into a contract with a venue, you will be held personally liable for payment if the event is cancelled or postponed. [p. 62]
4. (b) Solicit bids from at least two suppliers (also called “vendors”) for each event service. Compare prices, but pay careful attention to other “make or break” details - it’s not always wise to go the cheapest route. [p. 67]
5. (c) For most event vendors, a contract is critical. Most suppliers are familiar with and are comfortable working with contracts, and will probably be able to provide this document for you. [p. 69]
6. (c) Typical lead times for booking travel arrangements are 6 to 12 months for a domestic event location, and 8 to 18 months for an international event location. [p. 72]
7. (c) Don’t try to reduce food costs by eliminating mid-morning and afternoon breaks during an event. Not only do breaks provide needed restroom breaks, but offering a bit of refreshment will also help to re-energize people after sitting for long periods of time. Be creative and offer less-expensive food options. [p. 73]
8. (a) When a music license is required, you should explain the fees to the client, and then add them into your budget. At the time of publication, fees for a specific event are in the range of 5 to 6 cents per attendee. [p. 78]
9. (a) A good way to invite the media is by sending a media advisory. This is a one-page document which you can fax, email or mail. [p. 87]
10. (b) If your client is an association or non-profit organization, chances are they will want to find sponsors to cover some or all of the costs of putting on the event. A personal meeting with a decision-maker is much more likely to result in a sponsorship for your event than simply mailing a written proposal. If you are asked to submit something in writing, ask to arrange a meeting so you can discuss it in person. [pp. 88; 92]

# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 3

This week you will learn about skills essential to event planners. You will also learn about ways to learn about and to acquire the knowledge and skills you will use in an event planning career.

## Tasks

- Complete the week 3 readings from Chapter 3 as indicated below
- Answer the week 3 review questions
- OPTIONAL: Schedule your next half hour session with your faculty member

## Readings

Completion	Topics	Reading
December 8 (week 3)	<b>Developing Your Skills</b>  Essential Skills for Event Planners <ul style="list-style-type: none"><li>• Interpersonal Skills</li><li>• Organizational Ability</li><li>• Creativity</li></ul> Educational Programs <ul style="list-style-type: none"><li>• Degree Programs</li><li>• Certificate Programs</li><li>• Continuing Education Courses</li><li>• Professional Certification and Membership</li></ul> Other Ways to Learn from Experts <ul style="list-style-type: none"><li>• Vendor Meetings</li><li>• Information Interviews</li><li>• Event Planning Resources</li></ul> Learning by Doing <ul style="list-style-type: none"><li>• Volunteer to Organize Events</li><li>• Evaluate Other Events</li></ul>	Chapter 3 pages 100 to 134

- Do an Internship
- Get a Part-time Job

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 3 Review Questions

**1. For an event planner, having good Interpersonal Skills means\_\_\_\_\_.**

- a. You work well alone
- b. You work effectively with many people
- c. You are able to attract clients
- d. Both b. and c.

**2. Which of the following is arguably most important in building and maintaining relationships with both clients and vendors?**

- a. Doing whatever it takes to keep your word
- b. Treating others well and being likable
- c. Being upfront about obstacles and challenges
- d. Being passionate about your events

**3. For an event planner, a vital part of negotiating is\_\_\_\_\_.**

- a. Haggling
- b. Winning
- c. Knowledge
- d. Lowballing prices

**4. An effective way to negotiate a good deal with an event vendor is to:**

- a. Never ask directly for what you want
- b. Tell the vendor you are getting bids from their competitors
- c. Offer an immediate deal if the vendor reduces their price
- d. Both b. and c.

**5. Which of the following allows you to keep track of the details of your event?**

- a. Keeping a binder or notebook with tabbed sections for each aspect of the event
- b. Keeping an activity log to chart your activities
- c. Creating lists in order to prioritize tasks
- d. Setting daily goals in order to stay on track

**6. If you want to work in event planning without a degree, your opportunities will be greatest if you:**

- a. Start your own business
- b. Target large companies
- c. Target small companies
- d. Are willing to be an intern for several years

**7. Which of the following is one of the best ways to get expert information and learn about all aspects of event planning?**

- a. Get a degree in a field related to event planning
- b. Speak with a variety of vendors
- c. Subscribe to an industry magazine
- d. Ask others for evaluations of events

**8. During an information interview, which of the following may encourage event planning business owners to answer questions about their business?**

- a. Coming to the meeting with a list of thoughtful questions
- b. Showing them you are going into a niche they do not serve and will not be competition
- c. Asking them for a job, showing that you are a potential employee, not competitor
- d. Sending a thank you note to the person you interviewed

## Answers to Review Questions:

### Week 3 Answers

1. (d) As an event planner, you not only need to be a good organizer with creative ideas, but you will also need to work effectively with many people for an event to run smoothly; attract clients; and communicate well with vendors and staff. Accordingly, your interpersonal skills (i.e. your skills in dealing with other people) will be one of the key factors in ensuring that you are successful in the event planning profession. [p. 101]
2. (a) And perhaps most importantly – do whatever it takes to keep your word. As the example on the next page shows, you may sometimes need to depend on others to prevent an event disaster, requiring you to build relationships quickly! [p. 102]
3. (c) For an event planner, a vital part of negotiating is knowledge. If you enter into a negotiation about the price for an event service without first finding out the industry average, you will not know if the price the vendor is suggesting is fair or not. Do your homework and gather information on pricing and other variables from as many vendors as possible. [p. 107]
4. (d) One of the best ways of ensuring you are getting a good deal from a vendor is to tell them you are shopping around and getting comparative bids from their competitors; another is the offer of an immediate deal if the vendor reduces their price by a certain percentage. Also, don't be afraid to ask for what you want - the worst that can happen is that someone refuses. [p. 108]
5. (a) Have a binder or a notebook with tabbed sections on food, vendors, contracts, guests, publicity, etc., so you can easily lay your hands on the information you need. This binder should be self-contained and portable so you can bring it with you to vendor meetings and have it with you on the day of the event. Take the time to set this up early in the game, and maintain it faithfully. [p. 109]
6. (a) A college degree is not a requirement to become a successful event planner; however, without a degree your job choices may be limited because you will be competing for jobs with many applicants who do have a degree. Generally, you'll find most employers will expect you to have a degree, preferably in a field related to event planning. Your opportunities will be greatest without a degree if you start your own event planning business. [p. 113]
7. (b) One of the best ways to learn about all aspects of event planning is by speaking with vendors. After all, they are experts in their respective areas and most have built their businesses by servicing events. [pp. 120-121]
8. (b) While owners of event planning businesses may be willing to speak with you, be aware that they probably will not be eager to help if you plan to start a competing business in the same city. However, if you are going into a niche they do not serve, they might be willing to answer questions about their business such as which marketing techniques they have found most effective. [p. 123]



# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 4

This week you will explore places and industries that hire event planners and learn about how to find your dream event planning job.

## Tasks

- Complete the week 4 readings from Chapter 4 as indicated below
- Answer the week 4 review questions
- OPTIONAL: Schedule your next half hour session with your faculty member

## Readings

Completion	Topics	Reading
December 15 (week 4)	<b>Getting Hired</b>  Companies That Plan Events for Clients <ul style="list-style-type: none"><li>• Destination Management Companies</li><li>• Event Planning Firms</li><li>• Incentive Houses</li><li>• Public Relations Firms</li><li>• Advertising Agencies</li></ul> Hospitality Industry Employers <ul style="list-style-type: none"><li>• Hotels and Resorts</li><li>• Tourism Organizations</li><li>• Convention Centers</li><li>• Clubs</li><li>• Cruise Lines</li><li>• Vendors</li><li>• Attractions</li></ul> Corporate Employers <ul style="list-style-type: none"><li>• Corporations</li><li>• Trade and Professional Associations</li></ul>	Chapter 4 pages 135 to 189

- Non-Profit Organizations
- Government
- Universities
- Hospitals

#### How to Find Job Openings

- Advertised Positions
- Recruiters
- Unadvertised Positions
- How to Create a Job

#### Job Hunting Materials

- How to Prepare a Resume
- How to Prepare a Cover Letter
- Other Materials

#### Interviews

- What Employers Are Looking For
- How to Prepare for an Interview
- Interview Questions
- Following Up

#### Salary

- Negotiating Salary
- Typical Salaries

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 4 Review Questions

**1. If you are just starting out, one of the best ways to gain “real-world” experience in event planning is through which of the following?**

- Large businesses
- Professional associations
- Non-profit organizations
- Events for family

**2. To make the most of an event-planning internship, which of the following should you do?**

- a. Refrain from asking questions, since this may make you appear incompetent
- b. Do only the work you are assigned; if you request to work on a particular assignment, you may be seen as not wanting to “pay your dues”
- c. Don’t ask for feedback; allow your supervisor to take the lead on performance-oriented oversight
- d. Start a journal of your event-planning activities, documenting projects for use in your portfolio

**3. Which term below best describes the type of organization that provides local event planning services for clients who wish to hold an event in a different city?**

- a. Local management companies
- b. Destination management companies
- c. Convention centers
- d. Remote destination companies

**4. Which of the following types of event-planning organizations specializes in developing programs to motivate employees?**

- a. Incentive houses
- b. Public relation firms
- c. Outplacement firms
- d. Hospitality employers

**5. Typically, convention centers\_\_\_\_\_.**

- a. Only use outside event planners, according to the type of event being held
- b. Have in-house event planners
- c. Only hire interns due to limited budgets
- d. Regularly hire day laborers

**6. According to the U.S. Department of Labor, what percentage of available jobs are never advertised?**

- a. 30 percent
- b. 50 percent
- c. 80 percent
- d. 95 percent

**7. Which of the following resumes is often the best choice for new event planners?**

- a. Chronological
- b. Functional

- c. Geographical
- d. Combination

## Answers to Review Questions:

### Week 4 Answers

1. (c) One of the best ways to gain experience in event planning is to volunteer on event committees for local non-profit organizations. Non-profit groups are always looking for help with their fundraisers and galas, and you'll get the double benefit of helping a worthy cause while you hone your skills. This is also an excellent way to make contacts in the community to help you land a paying job when you are ready [p. 126]
2. (d) While internships may include menial tasks like running errands or filing, be proactive and look for any opportunities to get actual event planning experience—even if it means working a few more hours than you originally agreed to. Asking questions, requesting to work on projects that interest you and asking for feedback are all great ways to make the most of your internship experience. Get organized. Keep records of your work. Consider starting a journal of your internship activities, and try to document every project you work on for your portfolio. Keeping track of everything you've learned can help you when you apply for a job in the future. [pp. 132-133]
3. (b) Destination management companies (DMCs) provide local event planning services for companies that want to hold an event in a different city; they are hired for their local knowledge and resources to plan tours, meetings, conventions and other events. These companies offer a variety of entry-level job opportunities, ranging from sales to hosting tours. [p. 136]
4. (a) An incentive house (also known as an incentive company) specializes in developing programs to motivate employees. For example, an insurance company may hire an incentive house to plan a trip and meeting at a Caribbean resort to reward insurance agents who have accomplished sales goals. [p. 137]
5. (b) Convention centers usually have in-house event planners to deal with all the trade shows, conventions, and other events they might handle each year. Working for a convention center is a bit different from being a planner for a company, since a convention center will work with other event planners to assist them in running a smooth event. [p. 141]
6. (c) According to the *Occupational Outlook Handbook* published by the U.S. Department of Labor, "eighty percent of available jobs are never advertised." Even among the types of employers that usually do advertise, smaller companies are unlikely to spend hundreds of dollars to post jobs at a site such as Monster.com. [p. 156]
7. (d) The Combination Resume is often the best choice for new event planners because it highlights your skills, while also providing employers the chronological work history that they most want to see on a resume. [p. 163]

# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 5

This week you will learn about how to get started setting up your own event planning business. You will also look at financial matters and how to hire help for your business.

## Tasks

- Complete the week 5 readings from Chapter 5 as indicated below
- Answer the week 5 review questions
- OPTIONAL: Schedule your next half hour session with your faculty member

## Readings

Completion	Topics	Reading
December 22 (week 5)	<b>Starting Your Own Business</b>  Getting Started <ul style="list-style-type: none"><li>• Business Planning</li><li>• Choosing a Business Name</li><li>• Legal Matters</li><li>• Insurance</li></ul> Setting Up Your Business <ul style="list-style-type: none"><li>• Location</li><li>• Telephones</li><li>• Supplies and Equipment</li></ul> Hiring Help  Financial Matters <ul style="list-style-type: none"><li>• Start-up Financing</li><li>• Budgeting Expenses</li><li>• Keeping Track of Your Finances</li><li>• Taxes</li></ul>	Chapter 5 pages 190 to 231

- Setting Your Fees
- Getting Paid

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 5 Review Questions

**1. When starting your own event planning business, \_\_\_\_\_ can help you avoid costly surprises.**

- a. A marketing plan
- b. A business plan
- c. An insurance policy
- d. An assistant

**2. Which of the following types of event-planning services focuses on conferences, conventions, and trade shows?**

- a. Meeting planning
- b. Special events
- c. Destination management
- d. Incentive travel events

**3. A good starting point for developing your business plan is:**

- a. Choosing a name for your event planning business
- b. Deciding how to market your services to clients
- c. Deciding which types of events and event planning activities appeal to you
- d. Determining how much money you will need and what you will charge

**4. The least expensive and easiest way to start your event planning business is to form a:**

- a. Corporation
- b. Limited Liability Company
- c. Partnership
- d. Sole Proprietorship

**5. As an event planner, you may be able to add a rider to this type of insurance policy to cover the cost of reconstructing work-related paper documentation (e.g., client bills; invoices; plans; etc.):**

- a. Liability Insurance
- b. Property Insurance
- c. Life and Disability Insurance
- d. Both a. and c.

**6. When preparing start-up financing for your event-planning business, how many months of living expenses should you set aside beyond your start-up costs?**

- a. 1 month
- b. 3 months
- c. 6 months
- d. 12 months

**7. When you purchase items wholesale for an event, you may also be asked to fill out\_\_\_\_\_.**

- a. A manifest
- b. A sales tax license
- c. A seller's license
- d. A blanket certificate of resale

**8. The 'Cost-Plus' method of setting fees for an event is also known as:**

- a. An hourly fee
- b. A percentage fee
- c. A flat fee
- d. A consultation fee

**9. An 'On-Site Event Management Fee' for an event is a type of:**

- a. Percentage fee
- b. Consultation fee
- c. Flat fee
- d. Hourly fee



## Answers to Review Questions:

### Week 5 Answers

1. (b) A business plan can help you avoid costly surprises. If you are considering whether to leave a secure job to start your own event planning business, a business plan can help you determine the resources you will need to start your business and decide when the timing is best for you to get started. [p. 192]
2. (a) For event planners, a key component of your business plan will be deciding what services your business will offer. Meeting planners specialize in planning conferences, conventions, trade shows, and other business meetings. [p. 192]
3. (c) Once you have finished this guide, you should have a sense of which types of events, and which event planning activities most interest you. You can use that as a starting point for developing your business plan. [p. 194]
4. (d) A Sole Proprietorship is the least expensive way to start your event planning business. It is also the easiest because it requires less paperwork and you can report your business income on your personal tax return; however, one drawback to this type of business is that you are personally liable for any debts of the business. [p. 196]
5. (b) Because a lot of what you produce as an event planner is “intellectual property,” you might want to inquire as to how the insurance company you are considering regards paper: bills, invoices, designs, plans you’ve discussed with a client and written out, etc. You may be able to add a rider to your Property Insurance policy to cover the cost of reconstructing these things if something happens to your office. [p. 199]
6. (c) A standard rule of thumb is to have six months’ living expenses set aside beyond your start-up costs. Or, you might consider remaining at your current job and working part-time on your event planning business until it is established. [p. 213]
7. (d) When you purchase items wholesale for an event, you may also be asked to fill out a blanket certificate of resale by the seller. This simply means that you understand the situation and agree to pay the sales tax on the items you purchase. [p. 219]
8. (b) The Cost-Plus method involves charging clients a fee based on the cost of the event. After adding up all the costs of the event, you would charge an additional 10 to 25 percent as your fee (average is 15 percent). [pp. 220-221]
9. (c) With an On-Site Event Management Fee, you would handle on-site supervision and crisis management on the day of the event only. Fees for this service typically start at \$500 as you may be working from early in the morning until late in the evening. [p. 222]

# Event Planner

Course # EVPB-1114

Starting November 17, 2014

## Week 6

This week you will learn about techniques for getting clients. You will also have your last session with your faculty member and schedule your final exam.

## Tasks

- Complete the week 6 readings from Chapter 6 as indicated below
- Answer the week 6 review questions
- OPTIONAL: Schedule your final half hour session with your faculty member
- Review questions from weeks 1 to 6
- Schedule and take your final exam

## Readings

Completion	Topics	Reading
December 29 (week 6)	<b>Getting Clients</b>  Choose Your Target Markets  Promotional Tools <ul style="list-style-type: none"><li>• Printed Materials</li><li>• Your Portfolio</li><li>• Your Website</li></ul> Marketing Techniques <ul style="list-style-type: none"><li>• Networking and Referrals</li><li>• Promotional Events</li><li>• Advertising</li><li>• Free Media Publicity</li></ul> Marketing to Corporate Clients <ul style="list-style-type: none"><li>• Your Warm Market</li><li>• Cold Calling</li><li>• Responding to a Request for Proposal</li></ul>	Chapter 6 pages 232 to 291

### Working with Clients

- Responding to Inquiries
- Meeting with a New Client

## Review Questions

For the Final Exam, make sure you have studied and know the correct answers to the following Review Questions which test your understanding and recall of each week's readings. (*Answers to Review Questions appear after all the weekly questions.*)

### Week 6 Review Questions

**1. When it comes to telephone etiquette, which of the following should an event planner refrain from doing?**

- a. Having a call waiting feature
- b. Returning calls within a half-day
- c. Ignoring the phone if you're talking with someone in person
- d. Setting your phone in vibrate mode during meetings

**2. For event planners, a key component of getting clients will be to:**

- a. Offer as many services as possible, to whoever can pay you a reasonable rate
- b. Offer as many services as possible, but to a select clientele
- c. Decide what specific services your business will offer, and who you will offer them to
- d. Provide client kickbacks

**3. In event planning, a specialization may be:**

- a. A specific aspect of event planning (e.g., social events; destination management)
- b. One component of putting on an event (e.g., onsite coordination; event marketing)
- c. Event consulting services
- d. All of the above

**4. For event planners, the best letters of recommendation are those written by:**

- a. Clients
- b. Friends
- c. Family
- d. Vendors

**5. What is a great source of potential revenue that many event planners overlook?**

- a. Referrals from vendors
- b. Referrals from clients

- c. Partnering with other event planning firms
- d. Serving businesses outside your “target” market

**6. Found in many city magazines and daily newspapers that publish photos of people attending local charitable events, this type of column can be a source of free publicity for your business:**

- a. Advice column
- b. Event column
- c. Society column
- d. “Ask the Event Planner” column

## Answers to Review Questions:

### Week 6 Answers

1. (a) Call waiting is rude, pure and simple. Callers these days are used to leaving messages. If someone is on the phone with you, they don't want to be asked to hold in the middle of their conversation, unless it's a genuine emergency. [p. 205]
2. (c) It can be tempting for a new event planner to say something like: "I want to work for anyone who'll pay me!" However, it is costly and time-consuming to try to market your business to "everyone" and the truth is that some people will be more interested than others in the services you have to offer. [p. 233]
3. (d) A specialization - such as meeting planning, special events, social events, destination management, etc. - will determine your target market. For example, if you want to plan meetings, you might focus your marketing efforts on large corporations, companies in a specific industry, or professional associations. [p. 233]
4. (a) The best letters of recommendation – also referred to as "testimonials" - are those written by clients you have done event planning work for. However, you can also include letters of recommendation from past employers if the letters say good things about your abilities in areas that are important in the event planning business, such as interpersonal skills and organizational ability. [p. 240]
5. (a) Referrals from vendors are an incredible source of potential revenue that many event planners overlook. Consider establishing relationships with vendors. They could bring you a steady stream of new clients without advertising. [p. 248]
6. (c) Many city magazines and daily newspapers in large cities have a "society"-type column where they publish photos of people attending local charitable events. Every time you are involved with a charitable event, phone to invite the local publications to attend. [p. 258]