Conference and Event Management.

Self-Study Guide
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Courseware Version: 3.0
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How to Use This Guide

This Self Study Guide is designed and laid out in a way that will guide student learning much in the same way that an instructor would. This workbook is comprised of modules called *Sessions*. Each Session focuses on a major concept in the course.

In each *Session*, we have included short-answer and (in some instances) multiple choice questions which relate directly to the session material. Throughout the guide, you can take the opportunity to internalize what you have learned by completing various self-reflection exercises.
Session One: Course Overview

Course Overview

Although it does take plenty of creativity to design an event that is memorable and meaningful, it also takes careful attention to detail, adaptability, effective delegating, and a lot of work. This course will walk you through the process of event management, from the beginning stages of planning, to the final touches (like decorations, food, and music).

While this course is specifically for corporate event planning, the elements here can also be applied to more personal event planning like anniversaries, special birthday gatherings, weddings, and more. Essentially, we’re creating an effective and well planned design that is ready for implementation and can be used over and over again.

Learning Objectives

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

Why did you take this course? Use this opportunity to consider your personal learning objectives and reasons for taking this course.

________________________________________________________________________________________________________________________________________________________________________
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________________________________________________________________________________________________________________________________________________________________________
________________________________________________________________________________________________________________________________________________________________________
________________________________________________________________________________________________________________________________________________________________________

5 | P a g e
Pre Course Assessment

1. True or False: As an event planner, my customers are the delegates that attend whatever event I am planning.

2. True or False: Event planners all have industry-specific training.

3. The most essential planning element(s) of the event include:
   a. An event plan
   b. Budget
   c. Contracts
   d. All of the above

4. If there are budget items that change, it’s okay for me to go over budget by:
   a. 5%
   b. 10%
   c. 15%
   d. All of the above
   e. None of the above

5. True or False: Setting up a planning committee is a sign of weakness. I need to be able to manage events myself.

6. When I delegate:
   a. I give the entire task and responsibility away
   b. I retain responsibility for my results
   c. I have someone to blame if things go wrong
   d. None of the above

7. Advertising and marketing are best:
   a. Contracted out to a professional rather than done by volunteers
   b. Planned carefully, with a budget and task list
   c. Done when assigned the biggest portion of the budget
   d. None of the above

8. Diversity respects:
   a. Preferences and tradition
   b. People’s cultural background
   c. People’s ability levels
   d. All of the above
9. True or False: When collecting feedback from an event, it’s important to ask a variety of sources, including the client, delegates, vendors, sponsors, committee members, and yourself.

10. True or False: It’s important to send thank-yous to everyone that supports the event.

**Pre-Assignment**

You are going to plan a meeting for 20 employees in the marketing department. The meeting will have to be held at a nearby hotel or conference center since you do not have a big enough room at the office. Your task is to create a budget for the 4 hour meeting (9:00 a.m. until 1:00 p.m.), which will include a lunch. You also need to include a gift for each delegate: a 2GB USB memory stick with the company logo stamped on it.

Create a budget for this event.

<table>
<thead>
<tr>
<th>Item</th>
<th>Budgeted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Rental</td>
<td></td>
</tr>
<tr>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>Coffee/Tea</td>
<td></td>
</tr>
<tr>
<td>Alcohol</td>
<td></td>
</tr>
<tr>
<td>Gifts</td>
<td></td>
</tr>
<tr>
<td>Estimated Total</td>
<td></td>
</tr>
</tbody>
</table>
Session Two: Event Planning Essentials

Corporate event planning requires very specific skills and a love for detail. Whether you have been asked to plan your first event, or you’ve been doing this for a while now, you’ll find some helpful tools in this course. In this session, you’ll learn about creating an event plan, setting goals and objectives, and how to organize yourself for success.

Identifying Key Event Elements

When you’re asked to coordinate an event, the to-do list quickly blossoms. This course will provide you with the essentials for setting up an event of any size. You can use the tools and techniques here to make your event the absolute best it can be, whether you are arranging a meeting for ten people (in which case you can cross some of the tasks off your list quite quickly) or setting up a conference for a thousand delegates.

Your first task will be to start writing an event plan. Depending on the size of your function, this document may be one page or thirty pages. It will function as your planning document and the map that you use as your guide on the day of the event. You may also need to create a short version of the plan in order to keep your manager or client up to date with what’s going on.

Generate a list of all the aspects of the event that you will have to coordinate.

- Location
- Date
- Time
- Guest list
- Menu
- Decorations
- Transportation
- Entertainment
- Catering
- Audio-visual equipment
- Security
- Emergency procedures
- Parking
- Seating arrangements
- Guest registration
- Photography
- Video production
- Gift bags
- Welcome bags
- Guest gifts
- Gift certificates
- Thank you gifts
- Sentiments
- Media coverage
- Social media
- Website
- Email
- Flyers
- Invitations
- RSVPs
- Payment
- Budget
- Insurance
- Legal requirements
- Health and safety
- Environmental impact
- Accessibility
- Disability accommodations
- Language barriers
- Cultural considerations
- Diversity and inclusion
Here are some elements that are typically included. They are presented here in alphabetical order, not necessarily in the order that things need to be done.

- Accommodations (if needed)
- Activities
- Audience
- Budget
- Diversity
- Evaluation tools, such as conference reports and post event meetings
- Food and drink
- Invitations
- Marketing and advertising
- Master/Mistress of Ceremonies
- Objectives/goal of the event
- Partners and sponsors
- Registration process (prior to and on the day)
- Schedule (for the event and for the planning)
- Speakers
- Take-aways/swag bags
- Transportation
- Updates to your client or your manager
- Venue
- Other suggestions?
Setting Goals and Objectives

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

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

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

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

How to Write a Briefing Note

What is a briefing note?

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

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

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

How should your briefing note be formatted?

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

What should be included in your briefing?

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

**Background**

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

**Current Status**

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

**Key Considerations**

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

**Next Steps or Options**

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

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

Getting Organized

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

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

<table>
<thead>
<tr>
<th>Event Planning Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event name:</td>
</tr>
<tr>
<td>Event date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Budget</th>
<th>Actual Cost</th>
<th>Comments</th>
<th>Due Date</th>
<th>Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial Details</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop event theme</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop agenda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setup committee</td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify needs analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discuss with accounting</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Submit for final approval</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Venue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify three options</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit two options</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sign contract</td>
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</tr>
<tr>
<td><strong>Agenda</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>First draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Second draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Third draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Marketing and Promotion</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail campaign</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone campaign</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailouts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Swag Bag/Gifts</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bags ordered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Items received</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bags filled</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
About the 🟢 🟠 🟥 (GYR) Column

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

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

The budget is a critical aspect of your event plan. You’ll need to make a commitment to stick to it. Sometimes that means cutting out some of the things you would like to do and making some tough decisions.

In this session, you will review the pre-assignment. You will also learn how to set up a system for your event budget.

Pre-Assignment Review

Pre-Assignment

You are going to plan a meeting for 20 employees in the marketing department. The meeting will have to be held at a nearby hotel or conference center since you do not have a big enough room at the office. Your task is to create a budget for the 4 hour meeting (9:00 a.m. until 1:00 p.m.), which will include a lunch. You also need to include a gift for each delegate: a 2GB USB memory stick with the company logo stamped on it.

What did your budget look like?

<table>
<thead>
<tr>
<th>Item</th>
<th>Budgeted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Rental</td>
<td></td>
</tr>
<tr>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>Coffee / Tea</td>
<td></td>
</tr>
<tr>
<td>Alcohol</td>
<td></td>
</tr>
<tr>
<td>Gifts</td>
<td></td>
</tr>
<tr>
<td>Estimated Total</td>
<td></td>
</tr>
</tbody>
</table>

Is there anything missing here?

_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
The Real Budget

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

**Event name:**

**Event date:**

**Tax Rate:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Budgeted Amount</th>
<th>Amount Per Person</th>
<th>Total Estimate</th>
<th>Actual Amount</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ticket Sales</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsors</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partners</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licensing (alcohol etc)</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permits</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venue or Room Rental</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Meals</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and Beverages</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcohol</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Charge / Gratuities</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bartender Labor Costs</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Room Setup</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refreshments</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set Design/ Props</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projector</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computers</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Risers/ Podium</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Meals</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and Beverages</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcohol</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Entertainment</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio Equipment</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio-visual equipment</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Power</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Venue Area/ Reception Fees</strong></td>
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Getting Strict About the Budget

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

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

How will you manage budget shortfalls?

In the example in the pre-assignment, imagine that your budget is cut by 15%. What, and how, do you cut?
Session Four: Using the Committee Approach

Any event that you plan has lots of details, meaning that you are one person with a massive list. If you can focus on the things that you are good at, and bring people on board who can focus on things they are good at, you’re going to create a great event.

*In this session,* you’ll learn about getting the right people doing the right things and how you can delegate for efficiency.

**Getting the Right People Doing the Right Things**

Now that you know what you are looking at in terms of preparing for this event, you probably have a good sense of how much work you have to do. Unfortunately, we often resist asking for help. We want to prove that we can do something well, perhaps to get ahead of our peers or to make ourselves feel good. But some things are bigger than we can possibly manage in the time allowed. We need to ask for help in order to be successful. If you’re not accustomed to asking for or accepting help, start in small steps.

Who could you have on your committee?

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Volunteers

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

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

Just like your committee members, volunteers need to know:

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

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

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

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

Why do we resist delegating?

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Why do we resist having others delegate to us?

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What are some important things to remember when we delegate?

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

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

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

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

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

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

There are five steps to the delegation process:

1. Explain why the job is important.
2. Describe what is needed in terms of results (not how, but what).
3. Give the person the authority they need to do the job.
4. Indicate when the job needs to be completed and get agreement.
5. Ask for feedback to ensure a common understanding.
Session Five: Connecting with Partners and Sponsors

If you’ve been to a conference recently, you may have seen signs at the refreshment table or the coat check that say, “This portion of the conference is sponsored by Acme Widgets. Enjoy your coffee!”.

*In this session,* you’ll explore the value of asking partners and sponsors to support and contribute to your upcoming event.

**Benefits of Support**

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

**Partners**

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

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

**Sponsors**

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

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

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

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

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Session Six: Advertising and Marketing

Advertising and marketing efforts are designed to help us get the word out to the right people. It’s the greatest feeling in the world to have more registrations than you expected and to need to move to a bigger venue because so many people want to join you.

In this session, you’ll explore some methods to get the word out, learn about the touch factor, and set up a plan for take-aways.

Getting the Word Out

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

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

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

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

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

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

**Gathering Support**

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

Each touch does not have to be a lot of work. What’s important is to touch people in a way they respond to. Given how different people are, that means you’ve got to get creative. Here are some ways that event planners touch potential delegates:

- When someone joins an association and they receive their welcome materials, there is information about the annual conference included.
- You send an electronic newsletter that includes a notice about the event. Make sure you check the analytics so that you know how many people are actually opening and reading the newsletter.
- Shiny brochures are sent via post.
- An insert is placed with company invoices.
- You set up paid ads on the Internet where potential delegates can click a link for more information about the event. (You will usually pay a fee for each click.)
- You buy advertising space in trade journals.
- You ask other companies, associations, or groups to spread the news about your event.
- You place public service announcements on radio and television.
- You publish information with blog posts and on social networking sites.

Are there ideas that have worked for you (or backfired!) that you want to add to the list?

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Essentially you want to make as many touches as you can afford in the best way possible. If you can, ask other people in the same business what they have done to reach as many delegates as possible. Make sure that your marketing plan touches people frequently, at appropriate times, and without becoming annoying (which will turn potential delegates away). Detail it with your event planning worksheet.
Take-Away Planning

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

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

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

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

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

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

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

- You know they are checking their social networks as well as work e-mail, so why not use it to your advantage and make your event interactive and memorable?
- You can text updates or use a hashtag on Twitter.
- Think of the ease with which you can send out a message that says “#MyConference Session Two at 10:00 a.m. is moved to the Lighthouse Room.”
- Just make sure to include people who aren’t using social media, Twitter, or laptops!

But We Love Paper!

Even in a tech rich environment, you will have delegates who prefer their materials in the binder format. As part of your registration process, you could ask if they prefer electronic or paper materials. That way you’ll have the correct number of binders ready.

What other ideas do you have to market events, engage delegates, and create something memorable?
Session Seven: Selecting the Venue

Your venue will set the tone and atmosphere for the event. Are you looking for something fun and energetic to keep energy levels high? Or something quiet and conducive to serious work?

In this session, you’ll learn how to select the venue. We’ll outline what you need to consider to create the event that you want.

Picking an Appropriate Place

Meeting venues are very important to the success of your event. You will need to consider several aspects to make your event a success. Perhaps you are looking for a place that has great technology for your high-tech event. Or maybe you’ve been asked to choose a venue that offers exceptional conference space and also has a hotel attached. Are you looking for somewhere quiet and reserved, or do you want something that can also offer great energy and excitement for an evening party?

One of our in-house trainers has many stories about meeting places that were less than remarkable. In each case she was invited to present at a particular event and did not look at the space ahead of time (since she was travelling from out of town). She also expected that the event planner would have done their due diligence.

Here are some things that she experienced and that you want to avoid:

- A conference room in the lower level of a hotel that had pillars throughout. All the chairs had to be moved so that delegates had an unobstructed view of the room.
- A meeting room that accommodated 20 people nicely, but the large screen and projector created an image that was so big it was a strain for people to look at for the two day workshop. A technician had to be called in to shrink the image being projected.

If you are using a meeting room, make sure that you go look at it. Things to consider:

- Look for the location of plugs and jacks.
- Check to see if there is space for people to have their materials.
- If you bring in refreshments and food is there somewhere to put it, or do you need to have an extra table brought in?
What other things might you need to consider?
Session Eight: Feeding the Masses

Now let’s face it: some of us attend corporate events for just two reasons, and one of them has to do with food. People seem to automatically gravitate toward the refreshment area to get an idea of the food available. This can set the mood for the day and make or break the whole event.

*In this session,* you’ll learn about the things that every event planner has to consider when planning a menu.

**Setting up the Menu**

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

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

**Confused?**

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

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

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

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

*What about alcohol?* Although many North American functions do not include alcohol at lunch, it is often part of supper. In other places, there is no alcohol at all, and in other countries, a drink at lunch is perfectly acceptable.
So the question remains: how do we offer food and refreshments that people will enjoy? How can you feed people in a way that helps them enjoy a meal, caters to everyone’s needs, and respects your budget?

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

Brainstorm food arrangements for the following situations.

Your office


Hotels and conference centers


Parking lots on hot dog day


Unique venues in your area

The types of events that you will organize
Session Nine: Business Etiquette Basics

Etiquette is really about behaviors that help us get along. Rules vary greatly between countries, cultures, and regions, and they change over time, too. Helping people feel comfortable is a sign of a great event planner.

*In this session,* you’ll learn the basic elements of etiquette that might have an impact, and that you can influence, at your next event.

**Don’t Be Afraid!**

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

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

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

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

Getting comfortable with etiquette is made easier if we can anticipate things that could make delegates uneasy. Think about the aspects of etiquette that might be upsetting to you or your delegates and how you could assist people who will attend your event.
Think Space!

Think about the next event that you are planning. If you do not have one on your schedule, consider planning a meeting for 20 of your colleagues who will gather for a full day workshop, including lunch, and wrapping up with dinner at a local fine dining restaurant.

Create a list of five to ten things that you could do to help people feel comfortable at all aspects of the event and that will contribute to a successful gathering.
Session Ten: Celebrating Diversity

The world is a fascinating place, with a wide variety of people that we meet and cultures that we get to know. Diversity is another very important part of your event plan. It is a reflection of the range of people that we have the privilege to work with.

In this session, you will learn how diversity impacts your event planning and what you can do to bring a higher level of awareness to your life.

What Does It Mean?

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

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

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

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

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

**Diversity Attitudes**

Select yes or no for each of the statements below

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

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

Everywhere we go, we have the chance to experience great service, although some organizations don’t seem to make it a priority. As an event planner, your clients will notice how much attention you pay to service and whether you can really deliver on your promises.

In this session, we’ll consider what great service looks like and how we can promote that commitment in our events.

Introduction to Customer Service

The events that you plan have to be memorable and meaningful to your delegates, particularly if you want them to use your service in the future. One way to create the ambience that you want is to build an atmosphere of service. Service puts your customers first. It must be a philosophy that is shared by you and every person who is involved in this event.

The best way to build a service culture is to create it. Provide committee members, volunteers, and especially your event day people with an orientation about how the energy of the event needs to be perceived by all participants.

Generate a list of actions that demonstrate good customer service.

__________________________________________________________________________

__________________________________________________________________________

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__________________________________________________________________________
Critical Elements of Customer Service

**A Customer Service Focus**  
Everyone understands who the customer is and focuses on their needs.

**Defined in the Organization**  
Everyone from the CEO to front line staff knows what it means to work with a customer service focus.

**Given Life by the Employees (or your volunteers)**  
People live and exemplify the commitment to customer service.

**Be a Problem Solver**  
If something is not working, we figure out what needs to be done, and we do it.

**Measure It**  
We measure what service we provide, how satisfied our customers are, and what complaints they report.

**Reinforce It**  
Reinforcing desired behaviors helps us to live up to our expectations. It also helps us build relationships.
Session Twelve: Selecting Speakers and a Master of Ceremonies

Do you hire speakers for your events? Who will be the MC that acts as the glue and makes the event run smoothly? Having the right people at the front of the room can make or break your event.

*In this session, you’ll consider who you would like to have as the public face of your event and how to go about selecting them.*

**People in Your Event**

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

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

**Special Guests and Dignitaries**

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

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

**Speakers**

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

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

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

**IMPORTANT**
Websites can and do change. EDUWEB College takes no responsibility for the content or accuracy of third party websites.
People in Practice

Where you can resource speakers in your area?

What are your requirements for speakers?
How can we get comfortable with hiring speakers, making arrangements for speakers, and handling VIPs and MCs?
Session Thirteen: Managing Contracts

The days of a handshake sealing a contract are long gone. A contract protects you as an event planner, as well as your vendors and suppliers, so your understanding of contract language is another essential aspect to event planning.

In this session, you’ll learn about the essential aspects of contracts that will impact your work. You’ll also set up a list of who to contact when you need information.

Dealing with Contracts

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

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

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

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

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


When will you reach out to them?
Session Fourteen: Gathering Feedback

Some of us look for feedback constantly, while others find it more difficult. Gathering feedback on your event will help you to see what went well, where you can improve, and what you have learned.

In this session, you’ll explore how to gather feedback from event delegates and from your client or manager.

Gathering Feedback from Delegates

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

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

Quick Response

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

The room was very comfortable during this session.

The speaker was effective and engaging during this session.

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

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

Course: __________________________
Date: ____________________________
Instructor: ________________________

Please indicate your choice with an X:
1. Strongly agree
2. Agree
3. Not Sure
4. Disagree
5. Strongly Disagree

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

Suggested Improvements

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_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

51 | P a g e
Gathering Feedback from the Client

If you’re a typical event planner in a corporate job, you may spend a good part of your time involved in other activities, such as training or human resources. That means you may have been asked to plan and host the event by your boss, which makes him your client. If you’ve been hired by a company to plan their event, whoever hired you is the client. In either of those cases, you want to survey your client, since they are the one who will hire you in the future (provided everything goes smoothly!).

What kind of questions will you ask your client(s)?

Here are some suggestions:

- Are you satisfied with the outcomes of the event?
- What would you have changed to improve the event?
- Did we meet your requirements on budget and on time?
- Do you have events planned within the next 12-18 months that you would like our assistance with?
- Will you recommend our services to people within your company or network? If not, please explain why.

Your client may be less interested in what the delegates thought about the event than in what the delegates learned. You can survey the delegates a few weeks after the event or involve a trainer who can measure what’s been learned. Make sure that you build that aspect of the event into your budget and then report the feedback to your client.
Designing Feedback

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

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

How can we get honest feedback?
How can we see feedback as constructive and not as a personal attack?
Session Fifteen: Adding the Finishing Touches

There are plenty of things that you can add to your event that will make it memorable. Consider it similar to the way that you might add some embellishments to your office space or home to make it welcoming and comfortable.

*In this session,* you’ll consider additions to the event you are planning that can really add some atmosphere.

**Think about some things that make events memorable.**
**Five Fun Ideas**

- Live or recorded music (such as a duet for the opening reception or music during a special meal)
- Decorations (but remember that some venues have very strict rules about these)
- Signs
- Tablecloths and linens that complement the theme (association colors, for example)
- Novel noise makers to announce session times (like air horns, bells, announcements, whistles, bagpipes, or a drum line, depending on what the venue will allow)

**Case Study**

A committee was in charge of planning a conference for speakers and trainers that was hosted in a seaside community. They decided to create a maritime experience for the delegates. They planned stimulating sessions with content-rich learning, lots of networking opportunities, and arranged a venue that was able to work with the vision.

Instead of signs pointing “this way” to help people to find session spaces, they used easels with colorful folk-art from a local artist as signposts. The art pieces were later auctioned off for a local charity. Decorations on the tables during meals included floats from fishing boats, buckets, and fishing nets. A real fog horn was sounded when it was time for participants to return from breaks and meals. The final evening event was a maritime musical event (called a ceilidh), complete with lobster. It was a great way to tie the conference together with an engaging and memorable theme.
Session Sixteen: Event Day Roles

You’ve put a lot of work into your event, prepared your committee members and volunteers, and hired everyone that you need. Hopefully you’ve also had a good night’s sleep, and with luck, everyone else has too!

In this session, you’ll look at what the event planner does on the event day and how to put your best foot forward.

Things to Do

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

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

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

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

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

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- Needle and thread kit (miniature ones from hotels are ideal)
- Hair elastic and bobby pins
- Paper clips
- Safety pins
- Felt markers
- Masking or painter’s tape
- Bandages
- List of phone numbers to closest medical clinic/hospital and taxis
Other Items
Managing Your Image

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

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

Think of event planners who handle their image well.

What are they wearing?
What are they projecting?

What’s suitable for your upcoming events?
Session Seventeen: Closing the Event

In addition to asking for feedback, you have some work to do after the event that involves preparing your own feedback. This gives you an opportunity to close off the event completely and to carry forward things that worked well.

In this session, you’ll learn about how to prepare the conference report and hold post-event meetings. You’ll also think about some ways to thank and recognize the people who helped you plan and host your event.

Creating the Conference Report

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

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

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

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

Lastly, add your own evaluation of the event. Include what went well and what you would do differently in the future.
Holding the Post-Event Meeting and Thanking Those Involved

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

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

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

We’ve covered a lot of material so far! We know that if you have a chance to apply the principles that are now on your mind, you’re more likely to use them when you get back to your work.

In this session, you’ll have the opportunity to apply what you have learned by creating an event plan that you can set in motion tomorrow!

Creating an Event Plan Draft

Event Selection

To start, think of an event that you will be planning. Or, choose one of these options.
- A one day training workshop, including lunch, with 20 delegates and one trainer
- A three day conference with a full program of seminars and breakout sessions, lunches, refreshment breaks, and one evening event for 200 delegates
- A two day political meeting event in Canada’s Rocky Mountains, complete with opening reception, press conference, lunches, suppers, and meetings for 100 delegates from 20 different countries

Needs Analysis

What is the purpose of the event?

Who will attend?
What is the budget?

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

Is there a preferred venue?

Is someone leading the event, or do we need a master or mistress of ceremonies (MC)?
Are there preferred speakers?

Are there any restrictions on food and drink?

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

Other Notes
# Event Planning Worksheet

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Budget</th>
<th>Actual Cost</th>
<th>Comments</th>
<th>Due Date</th>
<th>Assigned</th>
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<tr>
<td>Develop event theme</td>
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<td>Develop colors</td>
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<tr>
<td>Set up committee</td>
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<td><strong>Budget</strong></td>
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<td>Identified in needs analysis</td>
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<tr>
<td>Discuss with accounting</td>
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<td>Submit for final approval</td>
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<td><strong>Venue</strong></td>
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<td>Identify three options</td>
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<td>Visit two options</td>
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<tr>
<td>Sign contract</td>
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<td><strong>Agenda</strong></td>
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<td>First Draft</td>
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<td><strong>Marketing and Promotion</strong></td>
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<td>E-mail campaign</td>
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<td>Telephone Campaign</td>
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<td>Mailouts</td>
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<td><strong>Swag Bags&amp; Gifts</strong></td>
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<td>Bags Ordered</td>
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<td>Items received</td>
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# Rough Budget

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<th>Budgeted Amount</th>
<th>Amount Per Person</th>
<th>Total Estimate</th>
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<td>Insurance</td>
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<td>Licensing (alcohol, etc.)</td>
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<td>Food and Beverages</td>
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<td>Service Charge/ Gratuities</td>
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<td>Risers/ Podium</td>
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<td>Flower, drapery, and fabric</td>
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<td>((Include mileage))</td>
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**Staffing Costs**
- Event Management Staff
- Production/ Technical Staff
- Tradespeople (Carpenters, electricians, etc.)
- General Event Labor
- Delivery Costs
- Union Dues
- Crew Costs
- Meals
- Accommodations

**Miscellaneous**
- Parking
- Event Management Fee

**Estimated Summary of Expenses (before tax)**
- Tax Amount
- Contingency Fund
- Total estimated expenses
Presentation

If you can, present your event plan to a colleague, family member, or friend. Ask them to evaluate you using this simple scale.

- Still needs a lot of work
- You’re getting there good start!
- Excellent work—this event is almost surely a success!
Personal Action Plan

You are nearly finished Conference and Event Management, and we want to help you take what you have learned and apply it in a very meaningful way. Many people have all kinds of great ideas when they finish a dynamic course like this, but things can come up that we need to deal with, and those ideas can be forgotten.

In this session, you will complete a personal action plan to take what you have learned and set some concrete goals to help you to make the changes that you want. Writing your goals down, and then checking in on your progress and making adjustments from time to time, are essential steps in getting where you want to be. We recommend that you take screenshots of your plan, or copy your goals down in your notebook, so that you can refer to them regularly.

**I am already doing these things well:**

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

**I want to improve these areas:**

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

**I have these resources to help me:**

________________________________________________________________________________________

________________________________________________________________________________________

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<table>
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<tr>
<th>As a result of what I have learned in this course, I am going to...</th>
<th>My target date is...</th>
<th>I will know I have succeeded when...</th>
<th>I will follow up with myself on...</th>
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Summary

**Congratulations! You have completed the Conference and Event Management course.**

In this course, we covered everything about planning an event from the ground up. We started by talking about the key elements of events. Then, we talked about how to perform a needs analysis and get organized with an event planning worksheet. Next, we explored how to build a budget and why it’s important to stick with it.

The next part of the course focused on the Who of an event: building a committee and connecting with partners and sponsors. Then, we talked about how to get the word out and build good take-away packages.

Next, we explored where an event should be, including food concerns. We also covered important supporting components to the event, like business etiquette, diversity, and customer service.

The next portion of the course focused on the nuts and bolts of an event: choosing speakers, selecting a Master or Mistress of Ceremonies, managing contracts, designing feedback gathering tools, and finishing touches.

Finally, we discussed what your role will be on the event day and how to put your best foot forward. We also talked about wrap-up activities, including thank-yous, conference reports, and post-event meetings.

The last part of the course gave you an opportunity to plan an event and present it to someone to get feedback. You should now be ready to plan and host your next big event!
Recommended Reading List

If you are looking for further information on this topic, we have included a recommended reading list below.


Post-Course Assessment

1. **The event planning worksheet should be completed:**
   a. After the event is finished
   b. Directly after the needs analysis
   c. Anytime you have all the blanks filled in and say it’s complete

2. **A handshake is a reasonable way to:**
   a. Greet someone
   b. Sign a contract
   c. Introduce two people

3. **A budget must be adhered to. If as an event planner I go over the budget, I:**
   a. Will lose credibility for future events
   b. Could be held responsible for the loss
   c. Could lose my position as event planner
   d. All of the above

4. **True or False:** In soliciting feedback from delegates, I can use a quick response type of grid after each session, including one that ranges from Strongly Agree to Strongly Disagree.

5. **True or False:** As an event planner, it’s essential to thank everyone involved in the event.

6. **During the event itself, your role includes:**
   a. Preparing, cooking, and serving food
   b. Driving to the airport to pick up delegates, speakers, or MC
   c. Troubleshooting; maintaining a first aid/emergency kit; and maintaining a calm, professional demeanor
   d. All of the above

7. **Etiquette is about more than what fork to use when. It includes:**
   a. Which way to part your hair to flatter your face
   b. Things we do to make spending time together (at meals or simply during gatherings) pleasant for everyone
   c. Where to place your name tag on your clothing
   d. All of the above

8. **A conference report is completed ______________ the event.**
   a. Before
   b. After
   c. During

9. **True or False:** Diversity at events includes demonstrating respect for people’s culture, ability levels, and more.

10. **Planning food for an event can be a major undertaking. Considerations include:**
    a. Allergies and sensitivities
    b. Cultural norms
    c. Healthy living
    d. All of the above