



JenniferJamesEvents

The Ultimate Event Planning Guide



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The most amazing events are those that magically transport you into another world. They're the ones that make you gasp as you enter the room and delight you at every turn. The food is amazing, the entertainment is exciting and you seamlessly move through the evening thoroughly enjoying every moment. When everything flows it just feels effortless – and that's the point. A well-planned event shouldn't feel planned at all. It should just magically happen – or at least seem that way to your guests.

In reality the strategy and effort that goes into planning these amazing experiences is enormous. It sometimes takes teams of people and months of planning to pull them together. The details can be overwhelming BUT there are a few key steps that can help keep every element organized and make any well-equipped planner look like a star.



Let's break
it down.



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Decide on your Purpose, Objectives and Goals

Deciding to host an amazing event is fantastic but if you don't understand the purpose, have specific goals and objectives to achieve this, then what's the point? A tremendous amount of resources can often go into planning the perfect event so ensuring your cause or company is adequately benefiting from all the effort is a fundamental first step.

These are some basic questions you can ask yourself...

- What kind of awareness levels are you looking for?
- How many and what type of attendees are you hoping to attract?
- What are your goals? (Celebration? Awareness? Marketing? Educational?)
- How much media exposure are you hoping to achieve?
- What kind of engagement would you like to see on social media?
- What are your networking goals?
- How many and what type of leads would you like to collect from the event?
- What kind of feedback are you hoping to receive? (beyond "that was amazing!")

When identifying goals and objectives, each event will require different considerations. Charitable events may require more promotional based goals while internal events may be more engagement focused. Not all of these questions will apply to every event but each one is worth considering when deciding what you want to accomplish.

Identifying goals and objectives with quantifiable metrics, will not only help you measure your success but will make it significantly easier for your team to make planning decisions that will ultimately optimize your efforts for the best possible outcome.

PRO TIP

Identify at least 3 quantifiable goals and objectives to help guide the planning process and measure your success after the event is complete.



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Plan Your Budget

Accurate budgeting can make or break any initiative and events are no different. Understanding your finances and prioritizing the elements that matter most is a crucial early step in an effective planning process. Amazing events can be designed around a wide range of budgets as long as expectations are clearly managed and prioritized early on.

There are a multitude of numbers to keep in mind when building your budget but they will generally fall under one of these main categories:

- ✓ Venue
- ✓ Food and Beverage
- ✓ Entertainment
- ✓ Staffing
- ✓ Software
- ✓ Audio/Visual
- ✓ Décor
- ✓ Sound and Lighting
- ✓ Marketing
- ✓ Contingency Funds

PRO TIP

When running a host bar it's important to know your audience but generally speaking budgeting for at least one to two drinks per person per hour should keep your estimates on track.

Plan Your Budget

Venue: This cost includes any room rentals and in some cases insurance, security, equipment or accessibility requirements associated with using the location. It's important to establish early exactly what is and is not included in your quote so there are no surprises down the road.

Food and Beverage: This is one of the biggest expenses and is determined by the number of guests and often a minimum order. Most venues offering food and beverage services will require their in-house offerings be used for any events hosted at their location and will generally charge an additional 15% – 19% gratuity or service charge on the final bill. Tastings are also generally an added expense to consider.

Décor: This is sometimes a broad category that can include multiple expenses and vendors supplying things like basic linens, chair covers and centerpieces along with more elaborate staging and furniture. Anything you may need to create the atmosphere you have envisioned all falls under décor.

Entertainment: Depending on the scale of your event this category can vary significantly. From simple DJ services to a full blown stage show, it's important to review all contracts, riders and travel requirements carefully when considering the necessary budget for these services.

Sound/Lighting: Venues generally offer a limited selection when it comes to quality sound and lighting options so it's always good to include this line item when you need to make a real impact through lighting and sound.

Audio/Visual: From staging to projectors to Wi-Fi requirements and even photography, this expense is often under budgeted for so consider your needs carefully.

Staffing: An often overlooked expense that includes any staffing requirements needed for managing any aspect of the event including any lodging, transportation and meal costs that may be associated with internal or external staff attending or working the event.

Marketing: A must have for most public facing events. This budget includes any advertising, promotional costs, graphic/web design expenses and any printing that may be required to spread the word.

Software: Event management and communications software can be massively helpful in the organization of any event, particularly those on a larger scale and should always be accounted for.

Contingency: Even the most meticulously planned events run into unexpected road blocks. Always round estimates up and be prepared for unexpected expenses. They're inevitable.

PRO TIP

If you're unsure of any costs, always contact your supplier and obtain a detailed quote.



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Choose a Theme and Brand It

A compelling theme is what ties everything together and sets your event apart. From invitations to décor to menu choices and entertainment, the entire atmosphere is impacted by this decision — so make it a good one.

Much like traditional branding exercises it's important to consider your audience, your goals and your existing branding when determining how to theme your event. Once a decision has been made it's time to design the signature look that will be incorporated into your invites, communications, promotions and event décor. This may even include a logo and tagline for larger scale or high profile events.

When working on public facing initiatives, consider incorporating a short, event specific hashtag to use in promotional materials and throughout the event. Encouraging hashtag use can significantly amplify the buzz around what you're doing, offer excellent opportunities to interact with your audience and provide useful material and user generated content for use down the road.

PRO TIP

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If you're stuck for inspiration start with a colour scheme! Colours evoke emotion and can often help inspire more fully formed theme ideas.



Decide on Timing

Ensuring there is adequate time to properly plan any event is essential. While some events may only require a month or two of work beforehand, others will require months.

When choosing an event date it's important to be mindful of any statutory or religious holidays, school breaks, competitive event dates and any other related events or timing considerations that may affect attendance. Understanding your target audience and scheduling your event around their needs will ultimately result in higher attendance and appreciation from your guests.

It's also important to carefully schedule every aspect of your event ensuring there is adequate time for networking, coffee breaks and smooth transitions. No one likes to be rushed but no one wants to wait around for ever either. Finding the right balance is imperative.

PRO TIP

Create a critical path or work back schedule outlining key planning dates, committee meetings and coordination times to ensure everything stays on track and all necessary responsibilities are communicated clearly.

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Choose a Venue

The venue you choose will affect almost every other decision associated with your event so this decision needs to be made as early into the process as possible. However, this is a decision that should never be made lightly. Consider your options and compare each one carefully making note of a few key qualities:

Location: Keep it convenient. Limiting the need to travel significant distances is a must in almost every scenario.

Size: The space required for 50 attendees is vastly different than one accommodating 500. It's important to avoid a space that will feel too cramped but also one that won't feel empty as well.

Parking: A lack of ample parking or reasonable means to access a location can be a deal breaker. If there is limited parking at your dream venue, it may be necessary to consider alternate transportation methods that make travelling to your location easy and enjoyable.

Accessibility: If your audience is one that may require wheelchair access, elevators, visual/audio aids or interpreters, this will be an important question for the venue management.

Loading Dock: Gaining access to a venue's loading dock can make set up and tear down significantly easier but be sure to clearly identify all the details around access, location, shared use and costs.

A/V: Many venues require their clients use their in house A/V services, which means it's important to address whether these services will adequately meet your needs and negotiate other options if this is not the case.

Food and Beverage: Much like A/V, if a venue includes an in-house kitchen, it's most likely they'll require you to utilize these services. Although many are often flexible with regards to catering specialty menus and serving stations, setting up a tasting is always recommended.

Insurance: In some cases there are specific liability rules and insurance requirements that will need to be carefully reviewed.

Deposits and Costs: The bottom line is always in important consideration for any aspect of an event. Ensure you are clear as to what is and is not included in any quote, along with deposit requirements and cancellation policies in case you need to cancel or reschedule.

PRO TIP

Always personally visit a venue no matter how amazing their website, Instagram or marketing materials may look. How a venue functions in photos can sometimes be far from reality.



Get the Word Out

In some cases a traditional invite is all that's required to attract attendees, but for others, it can get a bit more complicated.

Events hoping to appeal to a wider audience or those partnering with other companies or hoping to attract sponsors, require significantly more marketing attention and coordination. A variety of targeted communications may be needed to reach the right audience including:

Save the Dates and Invitations: The more creative and personalized these are, the better the success rate.

Website/Landing Page: Whether it's a simple registration page or a full blown website, it's always beneficial to have an online resource to communicate the necessary event details to your audience.

Sponsorship Packages: Large scale events hoping to attract sponsors, vendors or any other type of external support will need a formal detailed pitch pack to get their message across in the most professional and enticing way possible.

Advertising: Event advertising can take an enormous array of forms — Radio, Television, Print, Social Media – but the key to success, as always, is about knowing your audience and developing a message that resonates.

Public Relations: Always reach out and take advantage of any opportunities to promote your event through a news or influential outlet if it's appropriate for your event.

Social Media: Depending on the size of your event, creating a business page or event on social media can be an awareness game changer. However, consistent activity and interaction is always vital to the success of any social media based activity.

Follow Up Materials/Activities: Not everyone answers the first time, which means it's often necessary to send reminder emails or personally call those you really want to attend, sponsor or be involved in your event.

PRO TIP

Guests notoriously register late for events so be sure to include RSVP deadlines in your invite and follow up regularly before that time to reduce last minute panics.

Build Your Team

Event teams can include a myriad of different stakeholders whose contributions are extremely varied yet instrumental to the creation of the entire event. Although some are only indirectly involved in the planning, it is imperative the entire team fully understands their role and who they can rely on at each stage of the process.

Host: Perhaps this is you or your company or maybe you've been hired by this person. Either way, they're ultimately in charge and need to be kept apprised of the planning process every step of the way.

Event Manager: This role is a must, particularly for large or complex events. They're not only experienced but well connected and work strategically to ensure every aspect of the event is meeting the desired goals and the overall experience is one to be remembered.

Planning Team: This is the group that gets it done. They generally answer to the event manager and may take the form of a volunteer committee or paid team of experts but regardless of their structure, the value of a strong, resourceful planning team can never be overstated.

Event Staff: The teams running the welcome/registration tables and event activities along with your wait staff are often your guests' first impression and act as the face of your event. Ensuring they are friendly, knowledgeable and outgoing is all part of creating the best possible experience for your guests.

Vendors: Every event requires a different mix of third party suppliers working seamlessly with you and each other to ensure each element of the event is implemented smoothly.

Sponsors/Partners: Including sponsorships and/or partnerships within any event requires an additional level of collaboration and organization to ensure everyone's needs are met. While this dynamic can offer unique experiences, it's vital that clear offerings and responsibilities are established early in the planning process to avoid any disappointment or misunderstandings on event day.

PRO TIP

Incorporate digital registration systems whenever possible as manual practices are notoriously inefficient and prone to errors.



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Execute Your Event

On the day of the event it's all hands on deck and everyone needs to have a full understanding of what to expect and when. Preparing a detailed event schedule that includes absolutely every step from set up to tear down will help ensure each element is executed on time and you maintain full control over how the event unfolds.

Always be sure to include:

- Set Up/Tear Down Timing
- Coordination Meeting
- Registration Times
- Key Guest Arrival/Departure Times
- Speeches and Entertainment Times
- Food and Beverage Services
- Breaks
- Audio/Visual Sound/Lighting Checks and Event Cues
- Transportation Timing
- Activity Timelines
- Last Call/Event Completion

Every event schedule will look different but should include all event activities and transitions, clearly identifying those responsible for each element to ensure there is clear accountability every step of the way.

**PRO
TIP**

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Planning a production meeting with all event partners a few weeks before the event is a great opportunity to discuss schedules, responsibilities and any outstanding uncertainties so nothing gets missed.



Follow Up

At last your event is over. Hooray! But while the pressures are lifting there are still a few essential steps to address before any event can be officially wrapped up.

Success Assessment: In order to determine whether or not the event was a success, goals need to be reviewed and measurements analyzed. Were attendance and fundraising goals met? Were awareness and engagement levels what you had expected? In some cases sending out surveys can be a particularly useful feedback tool as well.

Recap Meeting: Conducting a follow up meeting with all the major stakeholders to discuss what went well and what can be improved upon is imperative in determining the overall success of the event. It's an opportunity to review all the available data, assess your teams overall performance and make decisions regarding how to proceed with future events and initiatives.

Finalize Payments: Ensure all event invoices are paid promptly to maintain a positive relationships with all vendors. It's also important to ensure any outstanding attendee payments or donation commitments are dealt with in a timely manner to avoid any accounting hassles or lost profits.

Follow Up: In the case of events seeking lead generation, follow up activities are vital. Confirm necessary communications with key prospects are completed and reported on, if applicable, in a timely manner.

Thank You's: No event is complete without a little gratitude. Acknowledging those who helped make the event a success including the planning team, sponsors, donors and guests is simply good etiquette. This should be done at the event itself and within any follow up emails, advertising or articles as appropriate.

PRO TIP

Schedule all post event assessment meetings within a week of the event while memories are still fresh. Keeping detailed notes will also be invaluable for future review.



Work with the Experts

Hosting events that achieve tangible goals while leaving a lasting impression can be a daunting task. The time, skill and creativity required isn't always easy to find which is why it's sometimes best to turn to the pros.

Jennifer James Events is a boutique Events Management Company specializing in creating exceptional experiences tailored to meet the strategic vision of each and every client. Jennifer, along with her talented team of event partners have an extensive history of producing a wide array of events including:

- ✓ Client Receptions
- ✓ Staff Recognition and Appreciation Events
- ✓ Corporate Seminars and Workshops
- ✓ Corporate Stampede Functions
- ✓ Corporate Holiday Parties
- ✓ Awards Ceremonies
- ✓ Consumer Tradeshows
- ✓ Corporate Fundraisers
- ✓ Conferences
- ✓ Product Launches



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403-294-1644

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