



# Perfect Event Planning

How To Successfully Plan, Structure  
& Host Truly Memorable Live Events

*...Even If you've Never Run One Before!*

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# Disclaimer

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# Planning Your Planning

Every event is unique, even if you plan the same type in the same venue using the same tools and inviting the same audience. And yes, even if you invite the same guest speakers, if your events supports guest speakers.



Each one will come with its own pleasant surprises, techno-glitches and unique problems – but don't let that panic you. Just remember that the most wonderful factor about events is that they are dynamic and alive.

It's like a party: Everyone brings something to the table, and if you've planned properly, everyone will have a great time. They'll go home with priceless take-aways and memories – and they'll be eager to sign up for your next event.

So how do you ensure each event ends up being wildly successful, no matter what individual problems or glitches occur?

It's all in the preparation.

In other words, you need to plan.

In planning, your goal is not just to set up one successful event, but also how to create or improve on a successful template, routine and method

you can truly rinse-and-repeat every time.

### **Step One: Endow Your Event with a Strong Identity**

If you define creating your event as “putting on a webinar”, you’re missing the goal post by miles. A successful event always has a specific goal or purpose and is targeted to individuals passionate about that goal. More than that, however, they are attending an event to get something out of it.

After you have identified your event goal or purpose, specifically write down what your guests are expecting to get out of it.

Then make sure you provide it.

Sounds simple, doesn’t it? And it can be simple – providing you keep it focused on your goal – and your guests (both event guests and guest experts).

You can also **use the principles you learn here to plan any type of event:**

- **Social** (E.g. Weddings, birthdays, family reunions)
- **Entertainment** (E.g. Concerts, comedy festivals, plays)
- **Business** (E.g. Webinar, multi-speaker podcast, live workshop on a business topic)
- **Education** (E.g. Community college course, weekend workshop on how to do something)
- **Exhibition** (E.g. Art exhibition, historical exhibition, fashion show)

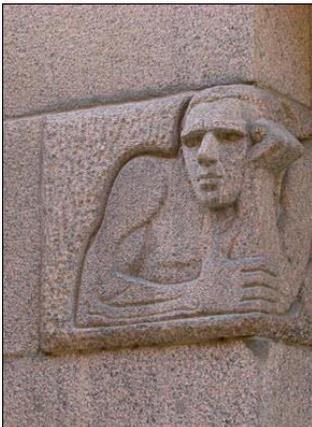
- **Conference** (E.g. Graphic Designers Summit, Survivors of Trauma Summit)
- **Trade** (E.g. Trade show, science fair)

In order to plan properly, you need to identify your specific type of event (the work of a few seconds!) But realize that each different type of event will come with its own unique needs – for example, recording software for a podcast or a hall for a banquet.

You may think you have a specific event in mind, but what you need to do first is brainstorm that generic idea to see if you can make it even more focused, targeted – and exciting.

### **How to Brainstorm Your Successful Event**

Sit down in a quiet room, make yourself really comfortable – and have a pen and notepad at hand. Play some soft music, if that helps you get creative juices flowing.



Now close your eyes for a few moments and do your best to visualize your event taking place.

How does that look to you? What's happening? What is your guest speaker talking about? What are your guests eating?

What questions are they asking and what comments are they making?

Now open your eyes and jot down ideas that occurred to you as you visualized these scenarios in your mind.

## **Identifying your Audience**

Who was at your event? What did they want? Did this strengthen your relationship with each one?

Knowing your ideal participant (and how much he or she would be willing to pay; and whether or not he or she *would* be willing to pay) is crucial to creating a final, successful outcome.

Now ask yourself these three questions:

- “How can I make this event even better?”
- “Is this the best type of event for my audience?”
- “What can I give them that no one else is giving?”

When you have allowed your event to crystallize in your mind and take on its own identity – when you have “seen” what a successful version of this looks like – it’s time to make it happen.

## **Step Two: Create a “Storyboard”**

Just as movie writers do, when selling the concept to movie backers, directors and producers, you should create a storyboard.

**Don’t skip this step:** Do it and you will find there are fewer gaps in planning and set-up – and if there are, these gaps or omissions will be both easier to see and quickly include at the planning stage.

You can create your storyboard in a format that is easy, quick and comfortable for you to produce: For example...

- **In thumbnail sketches** – just like a graphic designer plans an ad campaign (or cartoon story)

- **In mind-mapping software** – And there are many varieties of mind maps available to suit every preference
- **In MS Word Template format** – You can find all sorts of downloadable [event planning templates](#) for free at Microsoft.



- **With multi-media** – You can also create a Power Point presentation or set up a physical corkboard and pin index cards, business cards, color chips, brochures or photographs on it.

The latter could be photographs of:

- The venue
- Team members
- Guest speakers
- Food you'd like to serve
- Equipment you want to purchase
- **In point-form text** – If you are more comfortable simply writing things down, do so. Use a Text Editor, if you're more comfortable working on computer; or use a physical notepad – or even a napkin, for this preliminary stage! (Just make

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sure you carefully keep it and don't give it to your five-year-old to wipe chocolate cake off her nose with!)

Storyboards are not meant to be cast in stone: They are planning tools, and the best ones are fluid, allowing you to insert more data – or take away steps, team members or ideas that won't work.

It doesn't matter how you create your storyboard – just make sure you actually create one!

### **Step Three: Set a Viable Budget**

Now you have your strong idea and your preliminary storyboard. You're ready to set up the basic elements you need to allow for in every type of event.

The budget for the event determines its sophistication, scope, assets and features. It pre-sets who you can afford to hire, what you can (and cannot) include, and what you can afford to buy and supply.

It doesn't matter how big or small your budget is: Having a set, finite figure to work with actually helps you to narrow down your choices.

The best budgets do allow for some **flexibility**. If you can't be flexible in your bottom-line dollar figure, build it into other budget areas – for example, decide which event areas you can decrease funds for to allow for extra funds to be allocated to other areas, if necessary.

**Create an Excel spreadsheet** for your Event Budget. Provide a separate field for each potential or concrete area of expenditure.

Typical areas to consider might include:

Venue rental

- Catering costs

- Communication costs
  - Postage
  - Courier fees
  - Delivery charges
- Software costs
- Equipment costs
- Participant supplies
- Printing
  - Invitations
  - Flyers
  - Mailings
  - Posters
- Graphic design
  - Ad artwork
  - Poster graphics
  - Website graphics
  - Sales page graphics and layout
- Rental fees
  - Transportation

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- Equipment
- Furnishings
- Contract staff
- Advertising
  - Newspaper or magazine
  - TV or radio
  - Online and offline
  - eZine
  - Social media (e.g. Facebook, Twitter, LinkedIn)
  - Google AdSense

You will also need to create more than one spreadsheet:

- A spreadsheet for **projected expenses**
- A spreadsheet for **actual expenses**

Comparing the two will help you more accurately determine your ROI in your post-event analysis.

Finally, don't budget every last penny available. Try to leave a **Contingency Fund** for unexpected emergencies or extra expenses.

### **Step Four: Create a Timeline**

Now comes the most important part: Putting all these facts together and creating an **event Timeline**, using **milestones** to mark your progress.

The easiest way to create an accurate Timeline: Do not start out by

filling in any sort of calendar.

Instead, work backwards. Start with the event – and fill in every step that has to happen until you're right at the point you are now.

Take a good look at your Reverse Preliminary Timeline. Do you need to allow more time for certain steps to be brought to completion? Contact speakers, technical staff or contractors earlier? If so, move them to an earlier part of the sequence.

**Identify:**

- What needs to be set in motion immediately
- What needs to be set in motion fairly early
- What absolutely cannot be done until the last minute

**Decide:**

- Whether or not you are going to use a team or assistant to help you
- Whether or not you will assign a project manager – or be the project manager yourself
- Who is going to take care of what area

From your Reverse Preliminary Timeline, make a list of who needs to be contacted. Fill in that list with current, accurate phone numbers or email addresses.

Contact as many of these individuals as you can.

**Find out:**

- If they can participate

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- How much time they need to perform the task you want them to perform (or prepare their speeches, etc.)
- A final date you can agree on for checking in with each other
- How much they charge
- Their preferred payment arrangements
- How often you will meet – online or off
- How you will meet (in person? Via Skype? Within project management software?)
- What you need from them
- What they need from you

Write down or record everything (if you are using Skype or Google Hangouts for meetings).

Adjust your Reverse Preliminary Timeline to the new information, moving people and adding steps they have no doubt pointed out they'll need to take into more feasible positions.

Only when you have done this should you start recording this information on a regular calendar.

### **Make sure:**

- That everyone knows where the main event calendar can be found (e.g. "On the bulletin board beside the third-floor cafeteria")
- That everyone has their own working copy of the calendar, if possible – either containing just details relevant to them or with their responsibilities highlighted

Only when you have invested in proper planning can you look forward with confidence to a successful event.

# Event Planning Tools and Tactics to Make Things Easier



In our first module, we talked about the bare bones of event planning – the necessities. But there are tools and tactics you can use to make your event planning run quicker, easier and more smoothly.

Some cost money – and that’s where your budget will determine the type of tools you invest in.

Let’s start with a highly recommended strategy for running a successful event...

## **Step One: Deciding what you need**

Knowing the options that are out there is your first step in deciding which “tools” to add to your event planning toolbox, so let’s take a quick look...

Project management software or services

- Event planning software or services
- Time management software or services
- Apps
- Professional directories (for outsourcing tasks)

Deciding will depend on your particular, unique needs, but the larger the event, the more likely it is that using shortcuts such as Apps or time management software will become a necessity.

If you have more than one other person helping you, it’s also a good idea to consider investing in project management. This will help you avoid these prevalent areas of event-planning downfall:

- The “right hand not knowing what the left is doing” syndrome
- Confusion resulting in a lack of flow and coordination
- Tasks not being completed – and not finding out about it until it’s too late to easily rectify matters

Obviously, if your event is small and you are easily able to handle all components yourself, this is not an issue: But if you are outsourcing or have assembled staff or volunteers – if you are using a team – it becomes imperative to create good flow and communication. Whether or not you choose to hire or appoint an Event Coordinator or Project Manager, using the right software and services can help ensure you are easily able to retain a functional overview of event progression.

Let’s take a look at **how you can cut down confusion and increase smooth coordination** – and **how you can automate or simplify tasks** and their process and completion.

## Eventbrite

The screenshot shows the Eventbrite website interface. At the top left is the Eventbrite logo. To its right, it says "157,466,846 Tickets sold". On the far right, there is a link: "Need help? Visit our Help Center or Contact Us anytime! Join our team". Below the logo and text are navigation links: "Find events", "Print tickets", "Create an event", "How it works", and "Help". On the right side, there are buttons for "LOG IN" and "SIGN UP". The main content area features a dark background with the text: "If it's happening out there you'll find it here." Below this, it says: "Browse 1000s of events. Or create your own events and sell tickets right here." There is a green button that says "Create an Event (It's free.)". To the right of this text is a featured event card for the "4th Annual Boston Multifamily Summit" in Boston, MA, on Jan 30, with a "View event" link. The card includes a photo of a city street with a church spire and modern buildings. Navigation arrows are visible on either side of the event card, and a series of dots at the bottom indicates the current slide in a carousel.



Eventbrite helps you create and manage larger events. It is meant for registration and selling tickets online – and if your event is free, you don't pay.

It attempts to be a complete event-management system – and when your event has been created, it becomes one of their featured events that people can easily find in their event listings.

Eventbrite allows you to use its own, professionally-designed [event planning template](#). You can create email invitations on the “Manage” page. You can access and use any of Eventbrite's “How-to” guides.

You can also use a variety of tools, including calendar widget creation that allows you to do things like customize buttons or add an event countdown to your website.

Go to Eventbrite's [Features](#) page to see how it works – and if Eventbrite would be suitable for your event creation and management.

They advertise that you do not pay if your event is free. If you are collecting money, however, you pay a 3% credit card processing charge and a 2.5% “service fee”, plus .99 cents per ticket. (These charges vary by country.)

## 1 Create an event webpage

Add an event description and details to start selling tickets and collecting registrations.



ES END	PRICE	FEE	QUANTITY
1, 2013	\$0.00	\$0.00	0
1, 2013	\$35.00	\$2.92	0

Order Now

### Professional, customizable

Simple tools let you create an event webpage with logos, images, and URL, and send barcoded tickets.

### Accessible anywhere

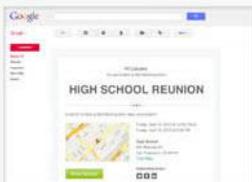
Online or mobile, it's quick and easy for people to buy tickets and register for your event.

### More payment options

Easily collect money online with our credit card processor, PayPal, and more.

## 2 Promote your event

Use our free tools to spread the word about your event.



### Get the word out

Email personalized invitations to your contact lists. Keep your event private, or automatically list your public events on search engines and our directory.

### Tap into social media

Increase your turnout by letting attendees promote your event on Facebook, Twitter, and LinkedIn to their friends and network.

### Track your attendance

See how many people are coming to your event, view your ticket and registration sales, and ramp up your promotional activity as needed.

## Eventbee

This company provides an alternative to Eventbrite. The two services are very similar – with a couple of notable differences. Both provide ticketing, number limits, and customization and promotion options (including customized QR codes). Both allow you to ask for donations and use promo codes.

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However, Eventbrite provides an API, allowing third parties to develop tools to be used in coordination with their services. Eventbee hasn't done this. But Eventbee allows you to provide the option to book specific seats – which Eventbrite doesn't allow for.

Though both provide social media options, only Eventbee allows people to register for your event *without leaving Facebook* – an advantage only if the majority of your niche segment are Facebook addicts.

Fees are similar, though Eventbee at first glance seems to be less expensive with its home-page offer of “\$1 flat fee pricing”. However, it is only less expensive than Eventbrite *if you use PayPal as your payment processor* – Eventbee does have hidden fees.

eventbee™  
Sell More Tickets With Less Effort!

\$1 Flat Fee Pricing Hundreds Of Features Sign Up Login

Facebook Ticketing App  
Sell tickets directly from your Facebook Fan Page!

SIGN UP FOR FREE

Ticket sold just now at Confirmation questions test

And with both registration services, you do pay extra to create a website, if you need one.

## Themeforest Event Templates

 <p>POLARIS</p>	<p><b>POLARIS - Responsive One Page HTML5 Template</b></p>	<p>in Site Templates \Entertainment \Events          Columns: 4+, Compatible Browsers: IE8, IE9, IE10, Firefox, Safari, Opera, Chrome, Compatible With: Bootstrap 2.3.x, Bootstrap 2.2.2, High Resolution: Yes</p>	<p><b>\$13</b></p> <p>★★★★★ 72 Sales</p>
 <p>HTML WEDDING DAY</p>	<p><b>Wedding Day - Responsive HTML Theme</b></p>	<p>in Site Templates \Entertainment \Events          Columns: 4+, Compatible Browsers: IE8, IE9, IE10, Firefox, Safari, Opera, Chrome, Compatible With: Bootstrap 2.3.x, High Resolution: No</p>	<p><b>\$13</b></p> <p>★★★★★ 14 Sales</p>

The Envato online marketplace offers a generous selection of Themeforest Event Templates, if you prefer a ready-made template over struggling to create charts, schedules and calendars on your own.

Prices average \$12.00 per template.

## Venuewize

### Plans & Pricing

<p><b>Unlimited Package</b></p> <p>Great for Frequent Users</p> <p>1 Month unlimited \$349.99</p> <p>Ticketing: 1.8% + \$0.70<sup>1</sup></p> <p>+ unlimited Help Desk support</p>	<p><b>Starter Package</b></p> <p>Pay-Per-Use for a single event</p> <table border="1"> <tr> <td>&lt; 100 Guests</td> <td>FREE</td> </tr> <tr> <td>101-400 Guests</td> <td>\$59.99</td> </tr> <tr> <td>401-1000 Guests</td> <td>\$79.99</td> </tr> <tr> <td>&gt;1000 Guests</td> <td>\$99.99</td> </tr> </table> <p>Ticketing: 1.8% + \$0.70<sup>1</sup></p> <p>+ unlimited Help Desk support</p>	< 100 Guests	FREE	101-400 Guests	\$59.99	401-1000 Guests	\$79.99	>1000 Guests	\$99.99	<p><b>Pre-Paid Packages</b></p> <p>Ideal for frequent users wanting a better deal</p> <p>3 Months unlimited \$999.99</p> <p>6 Months unlimited \$1,799.99</p> <p>1 Year unlimited \$3,199.99</p> <p>Ticketing: 1.8% + \$0.70<sup>1</sup></p> <p>+ unlimited Help Desk support</p>
< 100 Guests	FREE									
101-400 Guests	\$59.99									
401-1000 Guests	\$79.99									
>1000 Guests	\$99.99									

**Get Started for Free!**

This iPad check-in App allows you to auto-compile guests from iPhones and iPads, as well integrate with your event-planning team and track

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their performance. Provides analytics and allows you to auto-import Facebook attendee information.

Allows for online ticketing through a cloud-based guest list without the need for guests to actually print out or pick up tickets.

You can upload Excel files, add guests during the event, and track guest visits.

Free for up to 100 guests – and after that, the cost increases in bulk guest increments.

### **Sli.do**

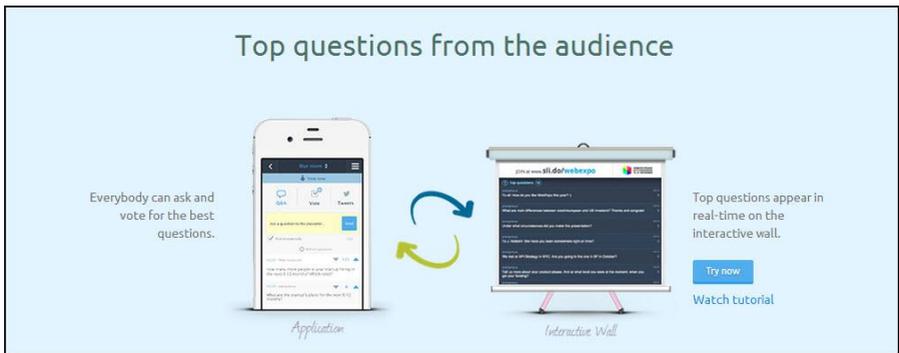
Sli.do allows event organizers to give their audience a voice. Sli.do CEO and ex-Google Industry Analyst, Peter Komornik describes it as “a web-based application for speakers and event organizers to easily engage their audience with live questions and polls”.

Core features with a free account include:

- Moderated Tweets
- Moderated Q & A
- Instant Polls

An interesting twist: In addition to extra features such as creating **agendas**, you can run a “**lottery**” at the end of your event, rewarding the “most active attendees” with prizes. (You can also **promote sponsors** on Sli.do’s interactive wall as well as share top questions – real-time – on the interactive wall.)

You can create your event in Sli.do – but at the free level, your event is searchable and all data is public. The next option up is the “Pro” level, at \$339.00 per event.



Sli.do won the Event Technology Award for “Best New Event Tech Startup” in December, 2013.

## SurveyMonkey

Survey Monkey has built up a solid reputation as a great place to create free surveys since its inception in 1999.

It also has a paid option that allows you to collect email addresses for your list and track all participants. Starting at \$19.00 CAD monthly, it is not expensive for the breadth of data it allows and provides.

There is limited theme color customization with the free plan, and you can create multiple choice, single choice or text field answers.

It takes only minutes to create a simple, up-to-10 question survey and distribute it – via email, on your site or via social media.

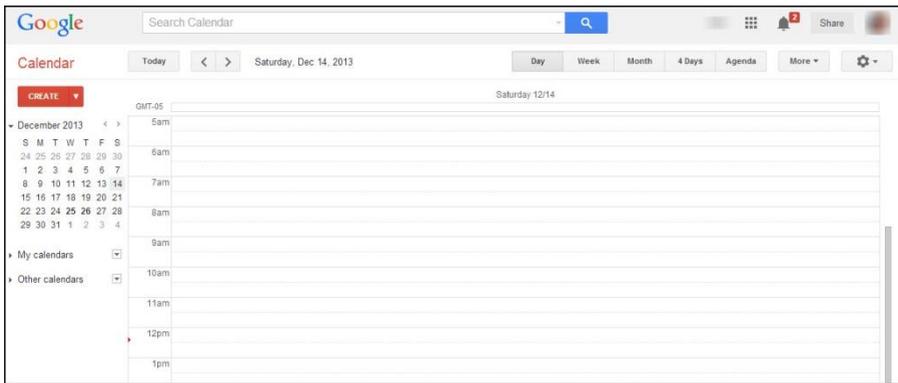
It takes even less time to check the responses to your SurveyMonkey survey in real time.

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The image shows the SurveyMonkey homepage. At the top left is the SurveyMonkey logo. To the right are links for 'Sign In' and 'Help'. Below the logo is a navigation bar with 'Home', 'How It Works', 'Examples', 'Survey Services', and 'Plans & Pricing'. The main content area features a large image of a smiling woman with glasses on the left. To her right, the headline reads 'Create Surveys. Get Answers.' Below this is a three-step process: 'Design' (Build your own surveys or choose from our templates), 'Collect' (Choose how to distribute and start collecting responses), and 'Analyze' (Use our powerful analytical tools for intelligent insights). On the far right, there is a 'Start Today' section with a yellow 'Pro Sign Up' button, the text 'Unlimited Surveys & Responses', and a white 'Sign Up FREE' button with the subtext 'Just the Basics'. At the bottom, there is a horizontal menu with categories: 'Customer Satisfaction', 'Education', 'Events', 'Market Research', and 'Human Resources'.

## Google Calendar



The image shows the Google Calendar interface. At the top left is the Google logo. To its right is a search bar labeled 'Search Calendar'. Below the search bar is the word 'Calendar' in red. The main interface shows a navigation bar with 'Today', navigation arrows, and the date 'Saturday, Dec 14, 2013'. Below this are view options: 'Day', 'Week', 'Month', '4 Days', 'Agenda', and 'More'. A 'CREATE' button is visible on the left. The main area is a calendar grid for 'Saturday 12/14' with time slots from 5am to 1pm. On the left side, there is a sidebar with 'My calendars' and 'Other calendars' sections.

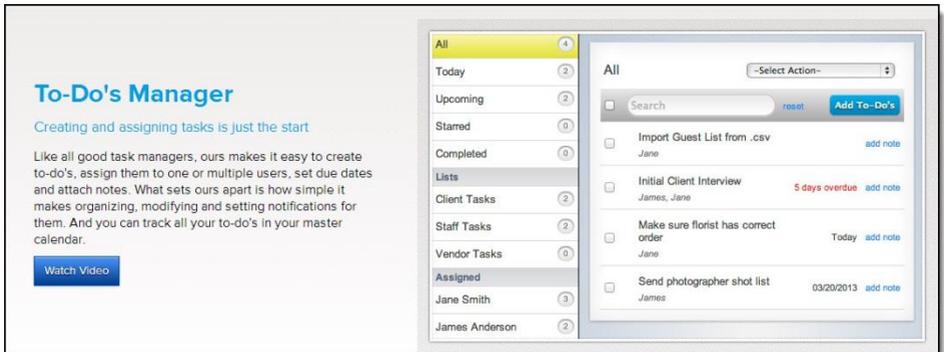
Most people know about Google Calendar – but did you know that Google Calendar actually allows you to import other calendars – or [create your own](#)?

Do so, when finalizing your timeline: Create a dedicated Event Timeline Calendar– and share your new Calendar with your team. You can share with specific people or even make your calendar public, if you wish.

## Event Manager Blog

A “must-follow” blog for anyone who plans to spend time in creating or managing events: This is where you will find all the latest news, trends and updates for event management and planning.

## **Planning Pod**



We’ve saved the best for (almost) last! This online event-planning App allows you to plan your event for every stage. Offers “24 time-saving tools”, including file and image sharing, budget prep, questionnaire management, contacts and permissions, guest input, reports, your .PDF download section, alerts, proposals, invoices, time tracking, re-usable templates and more.

Starts at \$6.99 for “one event at a time”.

## QR Stuff

One of the best free QR code generators, QR Stuff lets you take the simple QR code graphic you’ve just created and customize it with your own logo or graphics / use your custom QR code to promote your event.

This is just a taste of the tools, suites and services out there to help you plan your event more efficiently and successfully.

The screenshot displays the website's interface for creating visual QR codes. At the top, the logo for 'Visualead don't be square & QRStuff.com' is shown, along with the tagline 'Making your QRStuff QR Codes Visual'. Below this, three examples are presented: 'Turn this' shows a standard black and white QR code with the caption '(Your QRStuff QR Code)'; 'Into this' shows a QR code overlaid on a blue cartoon duck, with an arrow pointing from the first QR code to it; 'Or this' shows a QR code overlaid on a colorful hummingbird, with a red link below it that reads '(No thanks, take me back to QRStuff)'. At the bottom, there are three options: 'Upload an image', a blue button labeled 'Browse your files and folders', and 'Or select one from our Gallery'. A handwritten-style arrow points from the 'Gallery' text to the 'Or select one from our Gallery' option.

Be sure to check these – and more – out for yourself. And ask around: Sometimes the best tips come from those in your own niche.

Finally, there is one tactic that deserves its own module, so continue on to the next module to learn all about that most efficient event planning tactic of all – working with a team.

# Creating Your Dream Team

Trying to plan an event all by yourself is a roadmap to stress and an invitation to disaster. Working with a team of people – or even just the right, competent assistant – will cut the load on your shoulders, leaving you free to continue making money in your regular skill areas.

With a team structure, responsibilities are shared. Tasks are magically completed without your personal involvement. And a successful team means that next time, you are positioned to stage another event with even less hassle and headache.



Yet selecting a team means:

- (a) You hand over control of various components to others
- (b) You need to develop a project management strategy
- (c) You need to develop strong communication
- (d) You need to budget paying extra for help

## **Step One: Outsourcing and Delegating**

When should you consider using contractors and outsourcing for parts of your event? When should you consider hiring new staff or dedicating existing staff? When should you plan your event using a team... and when can you safely do it yourself?

The answer varies in every case, and depends largely on four main factors:

- **The size and/or complexity of the event.** (The bigger the event, the more people you need involved. Some events are so simple, you really *can* plan them yourself!)
- **Your budget.** (Can you afford help?)
- **Your unique skills.** (Are you the best person to perform every single task?)
- **Your time.** (Even if you can do so, *do you actually have the time* to plan the event yourself? Will you lose money if you take time away from your money-making skills to call about renting fifty chairs?)

Take a look at tasks you can outsource or delegate, and decide whether or not there are advantages to doing so. In the overall bigger picture of things, we can chunk that into “departments”.

Make a list of all the **tasks**, **positions** and **categories** you will need to plan for, when creating your event:

- Publicity
- Advertising
- Finance
- Project Manager
- Social media Manager
- Personal Assistant

We can also break it down by individual task:

- Rentals
- Equipment
- Catering
- Graphic design
- Web design
- Printing

You can also consider hiring a professional to coordinate your event:

- Project manager
- Event planner
- Ad manager

Again, who you hire (and how many) depends on budget plus the scope of the event. In your initial brainstorming meeting (or very shortly thereafter) get your helpers to sit down with you and also brainstorm the type of tasks the event will generate.

And this brings us to the question of exactly who will help you plan your event...

**Using existing staff:**



If you already have staff employed who could take over some or all of the planning for this event, you need to weigh the cost of their salaries against the work they currently do. Will they be able to do both their regular work and squeeze in event planning?

Is there one key person who you can assign to this event?

Deciding on staff with proven skills, to whom carrying out the tasks you have in mind would be easy, make this a “no-brainer” decision if any staff member fits the bill. But make sure you outline:

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- (a) Exactly what you expect them to do
- (b) When you expect them to do it by
- (c) How often, how, when and where you will communicate and check in

Again, your ROI must come into consideration. The time and aggravation you are literally handing over must be worth the expense of paying them to do event tasks.

If you plan on running similar events on a regular basis and one person above others stands out in helping plan and coordinate the event, consider promoting them to Event Coordinator.

### **Using outsource contractors:**



Your other option is to outsource some or all of the event preparation to freelance contractors who specialize in the particular tasks you wish to outsource.

The downside: Until they've worked with you on more than one project, they have no emotional investment in the success of this event – but be aware they do have other motivations (**financial** – they want to make money – and **reputation-building** – if you like their work, you'll either hire them again or recommend them).

The success of working with contractors depends on three things:

- Making sure you hire someone with proven skills who specializes in the area you want them to cover

- Checking out all references and word-of-mouth recommendations
- How well you “click” together

This latter factor has little to do with whether or not you become great buddies: It has more to do with how naturally and easily you both communicate, and how easy it is to delegate and hand over responsibilities without succumbing to the urge to micro-manage them. But whoever you hire – be sure to book them well in advance!

### **Using volunteers:**



A final, workable option lies in asking for and using volunteers. Depending on the number of volunteers, this may also mean it would be a good idea to appoint a volunteer coordinator.

(If you plan on using volunteers on a regular basis, or there are several, be sure also to commission or create a Volunteer Manual, outlining company principles, practices and values.)

The two main advantages of using volunteers are obvious:

- You don't have to pay them a penny
- They are doing it because they want to or believe in your event, which often means with enthusiasm and dedication

The biggest drawback?

- You are not paying them. They are volunteering. This means you cannot demand more time or dictate too specifically how much you need them to be involved. They are doing you a

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favor, so you must learn to be flexible, go with the flow and appreciate the time they do give you.

If you plan to use volunteers, however, it is important to understand the volunteer mindset. A volunteer may be volunteering for any one or more of many motivations:

- The desire to be needed
- The desire to feel important
- A passionate interest in your event
- A chance to use skills they possess in a meaningful and emotionally rewarding way
- Hope of paid future employment with you
- A chance to prove to themselves that they are still needed
- Alleviating boredom; “getting out of the house”
- A desire to have a finger in every pie

As you can see, motives vary wildly. Understanding your volunteer (or appointing a volunteer coordinator who does) will greatly help ensure that they complete their commitment – and enjoy doing so.

Finally, there is one thing above all others volunteers need and want – whether they admit they do or not: And that is recognition.

Be generous with praise – especially after the event.

Find a way to thank them – and do so. Some suggestions:

- A dinner
- An honorarium of some sort – either cash or a gift certificate or a gift
- Public acknowledgment and praise (mention by name in interviews)
- A recommendation
- A personal letter
- A job

## **Step Two: Communication**

A team is only as good as its leader allows it to be. One favor you can do for your team: Create a culture of excellent, clear communication.

Do this by making sure each member knows exactly:

- What she is responsible for
- Who she is responsible to
- When work is due
- When each check-in point should be
- When deadlines fall
- Who to ask for help/ask questions of
- What to do if she is running behind
- When you expect updates
- How often you expect updates
- Who the other team members might be – and what areas they are responsible for

There are many business owners who would instantly take issue with that last point. “My business doesn’t require each team member knowing about the other,” said one business owner on this topic recently. “I use all outsourcing freelance people. It’s enough each team member reports to my Project Manager, who keeps track of who’s doing what, when and where.”

### **Don’t Skip the “Welcome” Package**

Nevertheless, if your event involves team members working together, providing a bio page as part of their “Welcome” package helps create a sense of personal connection and solidarity.

Your “Welcome” package bio page should include:

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- A photo of each team member (so the others can put faces to names)
- A short blurb outlining what area they will be responsible for and a few key points about their special skills or talents

The aim of these mini-bios should be to create a strong impression of who each team member is as a person and what they bring to your event planning.

And do create a “Welcome” Package. It should include documents supporting your company culture and branding practices – some of which it is to be hoped you have already created: For example...

- Style Sheets
- Communication directory
- Team Bios and/or Project Manager bio
- Expectations and Guidelines
- Calendar or Schedule

This latter can just be a simple sheet with email addresses or telephone numbers next to names, with some indication of who to call about what – and when.

Creating such a package can be done in less than an hour (especially if you already have documents such Style Sheets or Communication directories created) and is well worth the time invested. It helps ensure everyone sticks to the same protocols and eliminates confusion.

### **How to Create Successful Team Meetings**

Later on, as you schedule meetings (if your event is large enough to require this sort of check-in) be sure to:

- Create a meeting Agenda
- Appoint a Chairperson for the meeting (if you’re not going to do this)

- Designate someone to take minutes

Be sure to let each person know that if they would like to speak about something not yet on the Agenda, they should contact the appropriate team member (e.g. the Chairperson or the Secretary) so that it can be added.

After each meeting, send a copy of the minutes to every team member.

All this can be done in a low-key, simple manner – the last thing you want is to go overboard on meetings and paperwork – but following a system eliminates mistakes before they have a chance to be made!

### **Step Three: Interviewing Candidates**

If you have to hire a staff member or freelancer, the protocol should be the same:

1. **Qualify your candidates.** Let them know the full scope of the job, your company core values and the skills you are looking for. In short, tell them everything they need to know in order to pre-qualify (or disqualify) themselves – and nothing they don't need to know.
2. **Check all references.** Completely.
3. **Present yourself – in your job ad and in person – in tune with your company culture and communication style.** See how the candidate responds to this: Is she over-chatty? Over-familiar? Too stiff and formal? Bored? Too brusque? While a different communication style is not necessarily the Knell of Death, it can be a valuable tool in assessing who is going to fit in with your company culture and who is not.
4. **Present your expectations and requirements clearly.** You don't need to go in detail, but better they know now if you have a no-missed-meetings policy than later, when you both discover your meetings conflict with their Volunteer Reader night at the local library.

5. **Know what you can be flexible about – and what you can't.** Keep it under your hat: Don't spell it out. But when you find yourself interviewing a candidate who can't accommodate your meeting schedule but who is otherwise perfect for the job, be prepared to bend a little (as long as the other team members won't be hurt by the exceptions you make).
6. **Be positive.** If you are positive, positive candidates will delight you – and shy ones will blossom into showing you their true colors.

Hiring the right person means learning to become a good judge of who will fit in and who won't. Will experience and skill level are “must-haves”, at the end of the day, looking for someone who works well both independently and as a team member is vital.

## **Step Four: Handling Your Event Project Management**

If your team consists of more than you and an assistant, you may want to start thinking about:

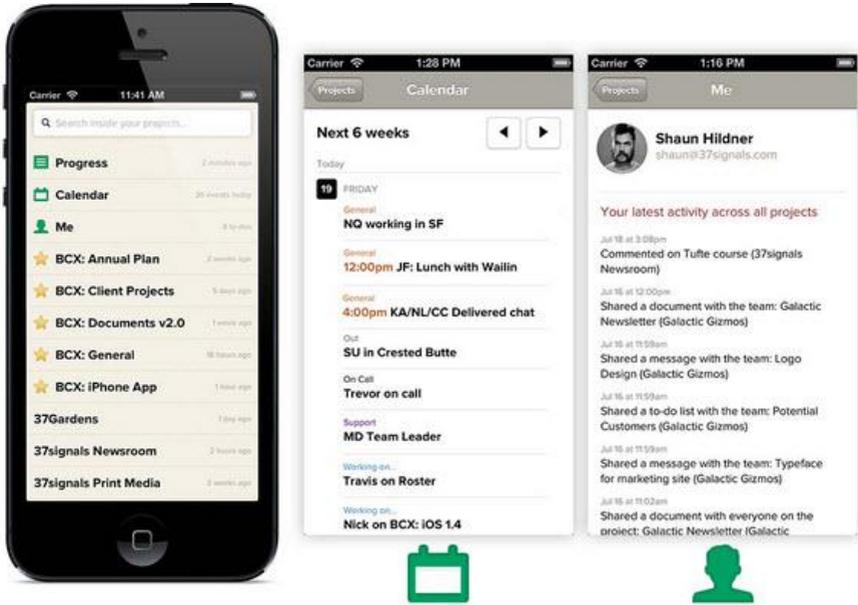
- A project management system
- A project manager

If you do decide to hire or outsource for the latter, be sure to choose someone with proven experience in (and a clear understanding of) project management – which is a separate art unto itself!

If people need to share files, make sure you use a cloud-based system where the right people can retrieve the right files from the right place at any time – day or night.

If you plan to use your team for more than event management, a more general project management suite might be in order – such as [Basecamp](#), which starts at \$20.00 per month.

And Basecamp for iPhone syncs with iOS 7 on both iPhone and iPad.



[Planning Pod](#) is a good system if multiple people have to grab graphics, reports, .PDFs or see where certain stages have reached.



**Discover why more planners prefer our tools**

Why do organized event professionals like you rely on Planning Pod?  
And why are they switching over from spreadsheets and other software apps?  
Let them tell you in their own words.

This software suite is dedicated strictly to event planning and management, and is inexpensive, streamlined and easy to use.

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And be sure everyone is on Google Calendar – in fact, [create a Google calendar](#) specifically for your event.

(Be sure to share it with everyone on your team and show/tell them how to import a copy.)

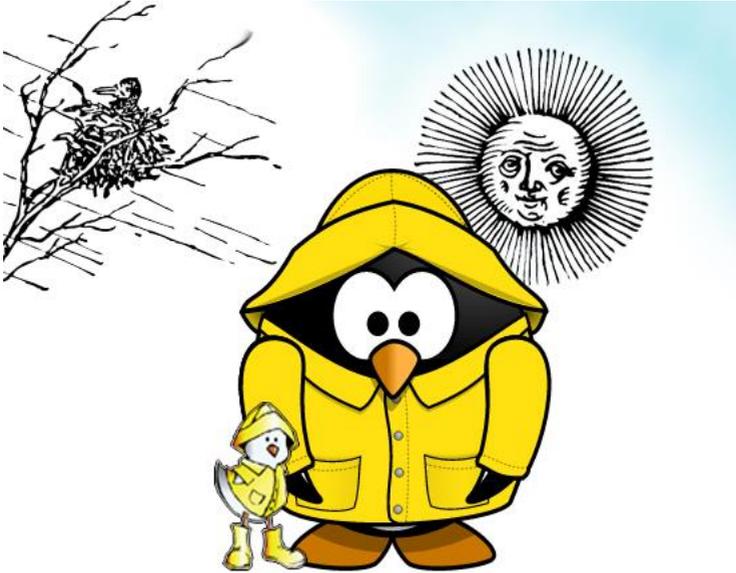


The screenshot shows the 'Create New Calendar' form in Google Calendar. The form is titled 'Create New Calendar' and has a 'Calendar Details' tab. Below the title, there are three buttons: '← Back to calendar', 'Create Calendar', and 'Cancel'. The form has three main sections: 'Calendar Name', 'Description', and 'Location'. The 'Calendar Name' field contains the text 'Washington Virtual Assistants Summit 2014'. The 'Description' field is empty and has a cursor. The 'Location' field is empty and has a small text below it that reads 'e.g. "San Francisco" or "New York" or "USA." Specifying a general location will help people find events on your calendar (if it's public)'.

Finally, don't overcomplicate things. Try to keep your team to a minimum – lean and mean (well, maybe not so mean): The simpler your team structure and systems, the easier and more foolproof effective event creation.

# Tailoring Your Events

Events of all types remained very similar right up until this last year, when event culture began to change.



Two factors are most likely responsible for this: Universal mobile addiction has changed the way people shop, interact, connect, search and access both local and online venues – and events. And people have become more impatient, more value-conscious, more demanding and far more selective.

As a general trend...

- Lower-income bracket consumers are more careful where they spend their money
- Higher-income bracket consumers are more careful where they spend their time
- Mid-income bracket consumers are more careful where they spend both money and time

New technologies have also altered the way both online and local events are searched, located, accessed, interacted with – and signed up for. So let's take a look at factors you need to consider, when creating events from this day forth.

### **Step One: Understanding where we're going**

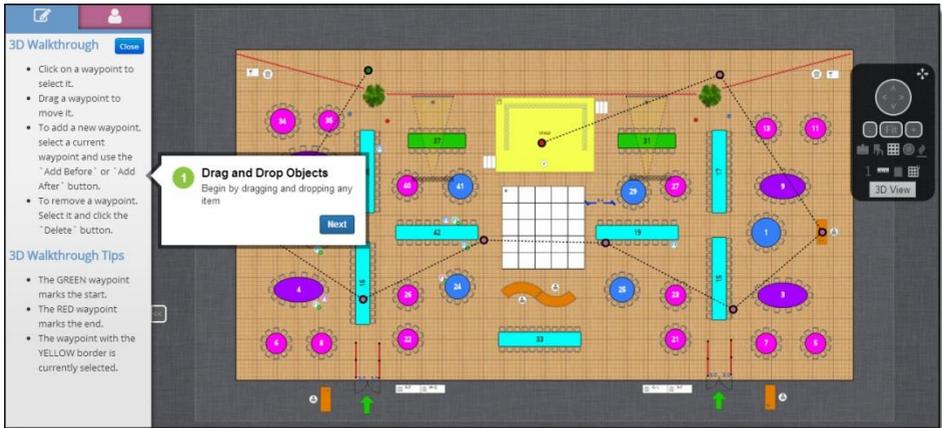
As far as event management goes, people are no longer suspicious of cloud-based storage and sharing. Cloud-based event management solutions are being adopted and adapted to with enthusiasm – but it's important to use the right platform with the right event – and the right audience.

For example, if you are hoping to attract higher-income bracket consumers, invest in a top-end event management planning platform such as [Social Tables](#): One that makes life easier for your prospective attendee and allows for easy growth as you expand your teams, your services and your events scope.

You can try it for free, and licenses for one user start at \$49.00 per month – but for a richer, larger event, you are more likely to have a team of three or four; in which case you may wish to go with their \$99.00 Pro access.

Social Tables is particularly ideal for meetings, social events – and trade shows. It is all about matching the quality of your event management with the quality your clients expect you to deliver.

If you need a planning platform that involves careful placement of physical elements such as seating, tables, stages, equipment and booths, this might be a platform to explore (and it syncs across any tablet, computer or mobile).



If you can afford to go top-of-the-line, can contact Social Tables for an estimate for their totally customized Enterprise pack, which offers a real, live Account Manager, 24/7 “red-phone” access, “white label” branding, partner integration and – something the wealthy expect, if diagrams are involved – 3D rendering.

But it doesn't really matter what platforms you go with as long as you **match the deliverables to your client income bracket**. So for wealthy clients, it's worth the investment in top-of-the-line services – and service.

No matter what income bracket your attendees belong to, however, remember that these days, the biggest shift is all about **putting more control into the hands of your attendees**.

Look for ways to do this as you plan your event, and you'll be giving yourself an advantage your competitors haven't yet realized exists.

Other trends include:

- Live event planning via the cloud
- Events that donate all or part of the ticket price to a favorite charity or worthy cause

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- More event-sharing and management via mobile apps – including:
  - Registration
  - Seating
  - Booking
  - Picture and document sharing
- One-page event mini-sites created with landing-page social platforms like [Erly](#).



- Use of premium, event-oriented WordPress themes like [Januas](#) and [Fudge](#).



- Heavier use of dedicate Apps for all aspects of event planning and management (such as [Hotel Map for Event Organizers](#)).



- Co-operative, interactive event planning that involves audience feedback, like [Sli.do](#).



- Faster check-ins and registrations, directly from social networks like **Facebook**, with Apps like [Eventbee](#) and [Venuewiz](#).



## **Step Two: What Makes a Great Event?**

You can use all the Apps, services and software you like, but if you don't know what people are looking for in an event nowadays, you may reap disappointing results.

The greatest factors in event success (once technology has been mastered and made easy) lies in both the guests – and your guest speakers. So know how to be a good event planner and totally cater – in the most effective way – to both.

### **Your Guests:**

When people decide to join an event, two factors that make a huge difference are:

- Ease of use/registration/access
- Interactivity

They want to be able to access your event from anywhere, at any time (preferably on their mobiles).

They want to be able to:

- Book travel arrangements
- Change seats
- View slides of the venue
- View seating plans, itineraries, agendas
- Confirm bookings
- Get directions
- View resources

And they want to do all this with a quick click. Even from Facebook. And find information on Twitter, and pictures and photographs on other social networks like

**Your Guest Speakers:**

Treat your guest speakers like gold. They too want all the same things your guests will want – quick access to documents and resources and all the conveniences that competent event planning offers.

Don't spring any surprises on them. ("Oops. We forgot to tell you, we just booked you a one-way ticket, you need to book your own return home.")

Make sure they receive all packages and documents in a timely manner.

Make sure you check to see you have received any materials they have contracted to supply in a timely manner.

Hire or JV with the best. The better your guest, the more appreciative your audience – but this comes with a rider...

...Make sure the quality and efficient organization of your event is on a par with your guest speaker's level of professionalism. No one wants to be embarrassed by speaking at an "amateurish" event, where several things go wrong and you forget to hire a transcriptionist. You should aim at impressing your guest speaker, as well as your guests!

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Finally, be sure to match the level of your guest speakers with your audience. Don't persuade the Minister of Finance to come and teach basic arithmetic to six kindergarten kids. (That's an extreme example, but it makes a point!)

Your guest speaker will want quality listeners too!

# Conclusion

Actively market your event in areas targeted to your ideal attendee. Track your event through your Apps, services and software (most of which will provide tracking metrics). Create a Facebook Page for your event (as well as a website). Use social media wisely and well for promotion. Engage people with contests and giveaways, using the most up-to-date Apps and methods.

**Follow up** EVERY event – no matter how big, how small; or what type – with an **evaluation form**, or a link to an evaluation survey (online, in emails, on social media).

Be sure to thank participants and guest speakers – both publicly and in private. Hand out surprise gifts – physical ones, if the event is at a local venue: Free digital downloads or high-value eBooks for online events.

Pay attention to the small details, eliminate unnecessary ones and above all, know your guests, your speakers – and the culture you're within.

Paying attention to current event marketing will help you quickly build a sterling reputation as someone who really knows how to put on dynamite events – and deliver the goods, every time.





## About the Author:



Do you ever wish you could find an easier way to attract new clients?

If you're thinking "Yes, I do!" you're not alone. Many professional service providers feel like that because their expertise is in providing the service that they're qualified to provide, rather than in the selling of it.

But just imagine for a second how great you'd feel, how much happier you'd be and how much more you'd be earning if suddenly clients were seeking you out, rather than you continually having to chase after them.

If our paths haven't crossed before, let me introduce myself. I'm Tim Dodd, a former chartered accountant and a specialist business workflow consultant. And I help my clients attract new business automatically.

If you're a business owner or professional service provider, who would like to automate their lead generation, prospect follow-up, and business relationship building processes in order to spend more chargeable time working with your ideal clients then I can help you to achieve that goal.

If you like the sound of that but you're not sure whether I'd be able to help your business or not, make an appointment to speak with me today.

Just head over to [www.3dconsultingservices.com/call](http://www.3dconsultingservices.com/call) and select a time that's convenient for you.

There's no charge, and I promise you'll be delighted that you did when you hear about a strategy that'll transform how you win clients in future!

I look forward to speaking with you and to helping you discover which key business processes you can easily automate in order to free up more time to make more money doing what you do best.

Wishing you the very best of good fortune

*Tim*

You've probably seen those long, scrolling sales pages online that seem to go on and on forever.

No doubt, you've received letters through the post from direct mail marketers, screaming at you to buy some new, miracle product or other.

And I'm certain you will have been approached in a shop by some eager young sales assistant who thought they knew exactly what you'd want... despite never having met you before.

If you're anything like me, you absolutely hate the thought of being categorised alongside any of the above. And yet you have to sell something in order to make a living. So, I've some really good news for you...

I used to feel exactly the same way as you do now which is why, when I accidentally came across this information and found that it worked really well, I decided to create this short book to help professional service providers like myself.

It's designed to provide readers with a series of simple strategies that will enable them to demonstrate to their prospects that they are really good at what they do and ultimately position themselves as an expert in their field.

So, if you'd love to have a regular flow of profitable new clients seeking you out as the expert in your field, then this book is for you.

And, by giving away your own book to all YOUR best prospects you too will soon be attracting new clients like iron filings to a magnet.

Enjoy!