THE ART AND SCIENCE OF EVENT SIMPLICITY

THE ULTIMATE GUIDE TO DESIGNING, PLANNING, IMPLEMENTING AND MANAGING EVENTS LIKE A PRO!

JANNA GERS COUTO

FIRST EDITION

Copyright © 2013 by Janna Gers Couto
All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of Janna Gers Couto and The Hedgehog Event cc. Printed in South Africa. First print edition.

This book is designed to provide information on event compliance and risk only. This book is presented solely for educational purposes. The information provided in this book is designed to provide helpful information on the subjects discussed. In the case of a need for any such expertise consult with the appropriate professional. This book does not contain all information available on the subject. This book has not been created to be specific to any individual's or organisations’ situation or needs. Every effort has been made to make this book as accurate as possible. However, there may be typographical and or content errors. Therefore, this book should serve only as a general guide and not as the ultimate source of subject information. This book contains information that might be dated and is intended only to educate. The author and publisher shall have no liability or responsibility to any person or entity regarding any loss or damage incurred, or alleged to have incurred, directly or indirectly, by the information contained in this book. Neither the author nor the publisher shall be held liable or responsible to any person or entity with respect to any loss or incidental or consequential damages caused, or alleged to have been caused, directly or indirectly, by the information or programs contained herein. No warranty may be created or extended by sales representatives or written sales materials. Every company is different and the advice and strategies contained herein may not be suitable for your situation. You should seek the services of a competent professional before beginning any program. You hereby agree to be bound by this disclaimer.
Table of Contents

CHAPTER 1: MARETING AND EVENTS DEFINED .................................................. 7
CHAPTER 2: THE EVENT MANAGEMENT PROCESS ..................................... 25
CHAPTER 3: STEP ONE DISCOVERY PHASE .................................................. 41
CHAPTER 4: STEP TWO RESEARCH AND DEVELOPMENT PHASE .......... 65
CHAPTER 5: STEP THREE PROPOSAL DELIVERY PHASE .......................... 105
CHAPTER 6: STEP FOUR CONFIRMATION STAGE ..................................... 113
CHAPTER 7: STEP FIVE PLANNING AND DESIGN PHASE .......................... 119
CHAPTER 8: STEP SIX APPROVAL STAGE GATE ..................................... 285
CHAPTER 9: STEP SEVEN IMPLEMENTATION .......................................... 289
CHAPTER 10: STEP EIGHT EVENT EXECUTION ......................................... 317
CHAPTER 11: STEP NINE CLOSURE ............................................................ 333

SPECIAL NOTE:

For the purpose and ease of reading the word EVENT is used throughout to refer to all special events, general events, and meetings interchangeably.

The word ORGANISATION refers to companies, institutions – any business that hosts events.

EVENT ORGANISER refers to the project leader, event project manager, event coordinator, event meeting planner, event planner etc. Anyone who is responsible for competently designing, implementing, delivering and managing events.
## List of Illustrations

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 1</td>
<td>Above The Line and Below The Line Strategies Explained</td>
<td>11</td>
</tr>
<tr>
<td>Figure 2</td>
<td>Event Management Concepts Relationship</td>
<td>27</td>
</tr>
<tr>
<td>Figure 3</td>
<td>Smart Event Process</td>
<td>28</td>
</tr>
<tr>
<td>Figure 4</td>
<td>The Nine Steps to Managing an Event Including ADMOR Domains</td>
<td>36</td>
</tr>
<tr>
<td>Figure 5</td>
<td>ADMOR, CCCVVS and WHs</td>
<td>36</td>
</tr>
<tr>
<td>Figure 6</td>
<td>Event WHs</td>
<td>37</td>
</tr>
<tr>
<td>Figure 7</td>
<td>The Six Event Stakeholders</td>
<td>38</td>
</tr>
<tr>
<td>Figure 8</td>
<td>Meeting Objectives</td>
<td>58</td>
</tr>
<tr>
<td>Figure 9</td>
<td>Research and Development Process</td>
<td>67</td>
</tr>
<tr>
<td>Figure 10</td>
<td>Client Concept Core</td>
<td>79</td>
</tr>
<tr>
<td>Figure 11</td>
<td>Brainstorming Core</td>
<td>82</td>
</tr>
<tr>
<td>Figure 12</td>
<td>Content and Concept Core</td>
<td>84</td>
</tr>
<tr>
<td>Figure 13</td>
<td>Concept ADMOR Core</td>
<td>85</td>
</tr>
<tr>
<td>Figure 14</td>
<td>Design Brainstorming Core</td>
<td>86</td>
</tr>
<tr>
<td>Figure 15</td>
<td>Marketing Brainstorming Core</td>
<td>86</td>
</tr>
<tr>
<td>Figure 16</td>
<td>Operations Brainstorming Core</td>
<td>87</td>
</tr>
<tr>
<td>Figure 17</td>
<td>Vendor Management Process</td>
<td>90</td>
</tr>
<tr>
<td>Figure 18</td>
<td>Entertainment Booking Process</td>
<td>94</td>
</tr>
<tr>
<td>Figure 19</td>
<td>Event Selection Process</td>
<td>97</td>
</tr>
<tr>
<td>Figure 20</td>
<td>Time Management Process</td>
<td>134</td>
</tr>
<tr>
<td>Figure 21</td>
<td>Organogram Template</td>
<td>152</td>
</tr>
<tr>
<td>Figure 22</td>
<td>Event Design Process</td>
<td>166</td>
</tr>
<tr>
<td>Figure 23</td>
<td>The Relationship Between Concept and Theme, Environment, Production,</td>
<td>170</td>
</tr>
<tr>
<td></td>
<td>Entertainment, Catering, Program, Invitation and Content.</td>
<td>179</td>
</tr>
<tr>
<td>Figure 24</td>
<td>Example of Floor Plan</td>
<td>180</td>
</tr>
<tr>
<td>Figure 25</td>
<td>Ceiling Plan Including Hanging Points</td>
<td>181</td>
</tr>
<tr>
<td>Figure 26</td>
<td>Determination of Useable Area and Venue Space</td>
<td>188</td>
</tr>
<tr>
<td>Figure 27</td>
<td>Table Spacing</td>
<td>189</td>
</tr>
<tr>
<td>Figure 28</td>
<td>Table Numbering</td>
<td>189</td>
</tr>
<tr>
<td>Figure 29</td>
<td>Completed Floor Plan Example</td>
<td>190</td>
</tr>
<tr>
<td>Figure 30</td>
<td>Serpentine Queue</td>
<td>191</td>
</tr>
<tr>
<td>Figure 31</td>
<td>Straight Line Queue</td>
<td>277</td>
</tr>
<tr>
<td>Figure 32</td>
<td>Stage Direction</td>
<td>340</td>
</tr>
<tr>
<td>Figure 33</td>
<td>A Systematic ROI Process Model</td>
<td>362</td>
</tr>
<tr>
<td>Table</td>
<td>Page</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>Table 1: The Client Interview Form</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Table 2: Example of Event/Meeting Objectives</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Table 3: SWOT Analysis Example</td>
<td>71</td>
<td></td>
</tr>
<tr>
<td>Table 4: Pre – Event Research Methods</td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>Table 5: Standard Budget Template</td>
<td>157</td>
<td></td>
</tr>
<tr>
<td>Table 6: Example of CCCVVS Budget Format</td>
<td>159</td>
<td></td>
</tr>
<tr>
<td>Table 7: Example of Program Budget Format</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>Table 8: Site/Floor Plan Elements</td>
<td>176</td>
<td></td>
</tr>
<tr>
<td>Table 9: Five Housing Options for Groups</td>
<td>264</td>
<td></td>
</tr>
<tr>
<td>Table 10: ADMMOR Setup for the Day of the Event</td>
<td>324</td>
<td></td>
</tr>
</tbody>
</table>
Marketing and Events Defined
COVERED IN THIS SECTION:

OVERVIEW
  Marketing
  Event Management
  Event Marketing
MARKETING DEFINED
EVENTS DEFINED
EVENT MANAGEMENT DEFINED
  The Art and Science
EVENT MARKETING
  Event Marketing Defined
  The Power of Event Marketing
  Why Include Events in Your Marketing Mix
  Experiential Marketing
THE BRAND
  Building Brand Awareness
BRAND EXPERIENCE
THE PURPOSE OF EVENTS
SUMMARY
CHAPTER 1: MARKETING AND EVENTS DEFINED

OVERVIEW

Marketing is a customer – focused business discipline that is interested in providing customer satisfaction and influencing decisions about the purchase of goods, services, ideas and causes. Too many people however, it means various things – advertising, selling or promotion, just to name a few. The American Marketing Association defines marketing as “The process of planning and executing the conception, pricing, promotion and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisational goals.” Note that the definition refers to conception, pricing, promotion and distribution.

This is very often referred to as the four P’s: Product, place, promotion and price.

- **Product** is the idea, goods or services being offered (the event).
- **Place** refers to how the product or service will be delivered to the consumer, where you find information.
- **Promotion** refers to how the organisation will communicate with the customer, the benefits of attending the event.
- **Price** represents what the consumer will provide in exchange for the product or service.

Developing and implementing an integrated marketing strategy will optimise the quality and quantity of participants for the meeting. The American Marketing Association defines marketing as “an organisational function and a set of processes for creating, communicating and delivered value to customers and for managing customer relationships in ways that benefit the organisation and its stakeholders.” The marketing campaign will describe the event benefits that each attendee will receive.

**Event marketing** can be defined as the activity of designing or developing a themed activity, occasion, display, or exhibit (such as a sporting event, music festival, fair, or concert) to promote a product, cause, or organisation.

MARKETING DEFINED

Marketing is the process of communicating the value of a product or service to customers, for the purpose of selling that product or service. Marketing can be looked at as an organisational function and a set of processes for creating, delivering and communicating value to customers, and customer relationship management that also benefits the organisation.

Marketing is the science of choosing target markets through market analysis and market segmentation, as well as understanding consumer behavior and providing superior customer value. Marketing satisfies these needs and wants through exchange processes and building long term relationships.
Marketing aims to do 3 things:
Objective 1#: Capture the **attention** of your target market (prospects).
Objective 2#: Facilitate the prospect’s **decision - making** process.
Objective 3#: Give customers specific, low – risk easy – to – take **action** that further facilitates their ability to make good decisions.

The purpose of marketing is to ultimately disseminate the brand message. The aim of marketing is to capture attention, facilitate a decision and to get customers to take action.

**MARKETING TOOLS**

There are a number of marketing activities marketers have at their disposal to disseminate the brand message namely Above The Line, Below The Line and Through The Line strategies. Above The Line (ATL), Below The Line (BTL), and Through The Line (TTL), in organisational business and marketing communications, are advertising techniques, or different strategies companies use to sell their products.

**Above The Line (ATL)** refers to promotional activities done at macro level. It is done at national or regional or bigger territory levels, and mass audiences are covered in this type of promotion. A brand image is created about the company and its product. Media such as television, cinema, radio, newspapers, and magazines are used to create an impact about the company and its product. ATL is more conventional in nature.

**Below The Line (BTL)** communication is unconventional in nature, done at micro level and forms part of non – media communication. Measures include direct mailing, distribution of flyers, brochures, and usage of sponsorships, public relations, tele – marketing, point of sale and events.

While both ATL and BTL communications can be used to either build brand awareness or drive sales through specific offers (promotions), it is BTL interaction that gives the marketer the ability to tailor their messaging in a more personal manner to the audience. Events form part of BTL campaigns.

**Through The Line** refers to an advertising strategy involving both above and below the line communications. This strategic approach allows brands to engage with a customer at multiple points, (for example, the customer will see the television commercial, hear the radio advert and be handed a flyer on the street corner). This enables an integrated communications approach where consistent messaging across multiple mediums creates a customer perception.

In a nutshell, while ATL communications use media that are broadcast and published to mass audiences, BTL communication use media that are more niche focused.
Once the ATL and BTL concept is understood one must understand how events fit in to the marketing strategy; what an event is; what event management is; and how these can be used as part of the marketing mix.

**EVENTS DEFINED**

An event can be defined as:

"A special event recognizes a unique moment in time with ceremony and ritual to satisfy specific needs." – Goldblatt

"Themed public celebrations." – Getz

"For people to come together to celebrate, to demonstrate, to honour, to remember, to socialize..." – Douglas et al

An event is an experience, carefully crafted to deliver an impact on the person in attendance. According to Dimitri Tassiopoulos, Author of *Event Management - A Professional and Developmental Approach*, events can be described as one – off or infrequently occurring occasions outside the normal program of the sponsoring or organising body.

To the events visitor, a special event is an opportunity to relax or to engage in a social or cultural experience outside the normal range of everyday activities. Special events are always planned, arouse expectations and motivate by providing reasons for celebration.

Jago And Shaw (2009) list the most important core attributes of events as:

- Being out of the ordinary or unique.
- Having a significant economic impact.
- Attracting media attention.
- Raising awareness of a region or enhancing its image or profile.
- Being one-off or infrequent occurrences.
- Being of limited duration.
- Offering a social experience.
- Attracting tourists or tourism development.

**EVENT MANAGEMENT DEFINED**

The term *Event Management* refers to the application of the management science for the development of festivals, meetings and events. It involves studying the intricacies of the brand, identifying the target audience, devising the event concept, planning the logistics and coordinating the technical aspects before actually executing the modalities of the proposed event.

The industry now includes events of all sizes from the Olympics for thousands down to a breakfast meeting for ten. Many industries, charitable organisations, and interest groups will hold events in order to market themselves, build business relationships, raise money or celebrate.

**THE ART AND SCIENCE OF EVENT MANAGEMENT**

*Event management* is both an art and a science. The event organiser must master an understanding of the theory, approaches and principles of events, as well as mastering the art of producing memorable experiences.

Creativity and imagination are vital in this field. It's what attracts individuals to the world of event management. The ability to establish and interpret the vision for an event project relies on the insight and the synthesis of the details of analysis into a ‘big picture’ concept. It is important that event organisers combine both the art and the science. They need to ensure that the creative vision meets the objectives of the project and that the needs of those working on and attending the event are met.

Innovative thinking and a holistic approach to event design and management provides the comprehensive synthesis an event organiser should strive for when conceptualising, planning and producing an event project.

It is crucial that event organisers also consider the science of the event. Logic is recognised as a foundation of events management, so much so that it is one of the primary facets of various competency blueprints for the industry. Analysis is characterised by the identification and examination of the details and hard data, surrounding an event.

Although the science of event management helps foster the replication and improvement of effective processes and choices, a basis for quality management initiatives, every event is unique even if recurring and longstanding. When an event organiser has a comprehensive understanding of the event this facilitates the logical examination of data and details and the ability to make quality decisions.
Meetings and events are serious business. They are critical to organisational success, both in terms of the value delivered to members and stakeholders, and the revenue generated for the bottom line. They are about connections, connecting people to each other, connecting learners to trainers and questions to answers, connecting individuals to the community and the profession or discipline, and connecting problems to solutions. Event organisers can help ensure that more valuable and relevant connections occur by approaching their work with the mindset of a scientist and a designer. Regardless of an events size or scope or who is responsible for its management, it is meant to make something positive occur for the participants, whose interest and attention it targets.

An event is not only a diversion for the spectators but a tool capable of unifying great bodies of people around a specific happening and at its best - an idea. The strength of a good event is that is able to satisfy the participants on more levels; the need to be stimulated and interested; the need to mix with others, the need to feel part of a greater whole, the need for expression, the need to be understood, and the need to grow. Designing, implementing and delivering the event requires an understanding of the theory component of events management as well as the ability to produce memorable concepts and themes. It is both an art and a science. Event organisers need to be able to embrace both forms in order to lead themselves and others.

**EVENT MARKETING**

*Event marketing* can be defined as the activity of designing or developing a themed activity, occasion, display, exhibit, sporting event, music festival, fair, or concert) to promote a product, cause, or organisation. It is one of the fastest growing fields in marketing and advertising today. It's everywhere you look in today's culture although you probably don't readily recognise the majority of the event marketing programs when you see them. That's because there are many flavors to event marketing and there are no hard rules about what exactly is and isn't event marketing.

The huge, custom-converted tractor/trailer semi with dozens of Playstation 2 stations where you played the hottest new game titles while at the X Games = Event Marketing. Have you been on holiday or at a vacation hot spot and been approached by an attractive model who wanted you to sign-up or try something? That was an event marketing program in action.

Event marketing is a promotional strategy that involves face-to-face contact between companies and their customers at events like concerts, fairs, conferences and sporting events. Brands use event marketing entertainment (like shows, contests, or parties) to reach consumers through direct hand-to-hand sampling or interactive displays. The practice works because it engages consumers while they're in a willing, participatory position.

While advertising and major marketing programs blast millions of consumers with the same general messages on television or mass media, event marketing targets specific individuals or groups at gathering spots where they hope to make quality individual impressions.
THE POWER OF EVENT MARKETING

According to a 2012 study by the Event Marketing Institute:

| 58% of event marketing participants purchased the marketed product after the event. |
| 86% of these consumers became regular customers. |

According to Al and Laura Ries (who wrote *The Fall of Advertising and the Rise of PR*), we are exposed to nearly five thousand advertising messages during the average day. They go on to say that as advertising has increased, advertising messages have become wallpaper. Advertisements surround us from early in the morning to late in the night. As a result of the volume and the variety, we tend to tune all advertising messages out. Only when it is unusual do we pay attention to it.

**According to Thomas Smith…**

You need to see ad 20 times before you will consider buying what is being advertised. He says…

- The first time people look at any given ad, they don’t even see it.
- The second time, they don’t notice it.
- The third time, they are aware that it is there.
- The fourth time, they have a fleeting sense that they’ve seen it before.
- The fifth time, they actually read the ad.
- The eleventh time, they wonder how the company is paying for all these ads.
- The 20th time they might buy what is being offered.

It has been stated that the average consumer feels that the information presented in advertisements is one–sided and does not tell the whole story and therefore can be misleading. Furthermore this form of traditional marketing does not make direct contact with the consumers. As a result the events industry has emerged as a firm favourite. It has become a leading marketing tool used by companies to disseminate their brand message. This type of dissemination is direct and it allows companies to make direct contact with their customers and clients. It further allows them to communicate their brand message in a fun, exciting, entertaining environment. If event organisers can learn to harness these tools – long lasting relationships can be formed.

As the business world embraces a global economy and thousands of new businesses set up shop each year, events can make a thriving, driving impact that gives companies a unique identity, separates the enterprise from the pack, streamlines operations, improves communication internally and externally, and adds profit to the bottom line. No matter what business, an event will undoubtedly make its way into the organisation’s goals, objectives and plans.

A successful event marketing campaign provides value to attendees beyond information about a product or service. A fun event will make customers feel like they are receiving a benefit and not just attending a live-action commercial.
In contrast to traditional advertising, which blasts millions of consumers with the same general television, radio or billboard message, event marketing targets specific individuals or groups at gathering spots, in hopes of making quality individual impressions.

The key to pulling off an effective event marketing campaign is to identify the target audience correctly and create an experience that remains in the participants’ memories. By finding an opportunity to interact with the right demographic of people (both current customers and prospective buyers), a brand can build favorable impressions and long-lasting relationships. The best, most creative events create interactions that not only reflect positively on the brand at the time, but generate a buzz long after the event is over.

WHY INCLUDE EVENTS IN THE MARKETING MIX?

Every business seeks to stand out from their competition, and event marketing can help you do just that. Whether hosting a small webinar, a large-scale international tradeshow, or an executive-level private function, event marketing needs to be an integral part of the demand generation mix. After all, a strategic combination of online and offline marketing is essential to any company’s bottom line.

But one thing is non-negotiable - events must be memorable to make an impact. Of course, the desired impact depends on the goals. But most companies want events to be more than just a staged advertisement for their brand.

When done well, events have the power to create a lasting and powerful positive impression of all that the company can deliver. By allowing people the opportunity to experience and interact with the company, product or service while participating in an event, the organisation can connect with potential buyers. It’s no wonder most companies include event marketing as part of their overall marketing mix. According to the 2012 IDC Tech Marketing Benchmarks Study, on average event marketing constitutes 1/5 of the marketing budget, a pretty sizeable percentage.

EXPERIENTIAL MARKETING

*Experiential marketing* is a holistic approach to identifying and managing, to a specific end, the key touch points that define an experience that a customer has with a product or service. Identifying in this case, means using research to isolate the individual touch points that combine to form larger experiences. Touch points are the physical, communication - based, and human interactions the customers experience during their relationship with the organisations brand. To manage means to be purposeful rather than casual.

Experiential marketing is an interactive two-way marketing communications tool, which aims to bring brands to life and communicate complex brand messages through interactive sensory experiences that should excite and engage the customer. It is now seen as one of the best ways of developing brand awareness in a crowded market space. It is important to understand how to maximize the brand voice by engaging customers in a two-way communication process that will bring the brand to life and add value to the target audience. In order to do this the event organiser must understand the client’s brand and what type of brand experience they want to deliver to audience members. Consider what that message is?
THE KEY TO BRAND SUCCESS

In order to effectively market the organisation’s products or services, the event organiser must firstly understand the company brand, and secondly identify what experiences will best suite the consumers. For true event success, the single most important thing is in understanding the brand. Most event organisers set off planning an event without knowing what the brand means to others, how people feel about it, what it represents, and what its traits are. Without this knowledge one cannot hope to run a memorable, brand appropriate event.

The greatest brands in the world all have one thing in common – they know who they are, what they are best at, and they consistently deliver on their promise. It is the event organiser’s responsibility to ensure that everyone involved in the event understands the brand and the objectives of the event.

The key to brand success linked to the event is in:

• Understanding the brand and the brand experience of the event.
• Knowing what people feel about the brand.
• Developing a character diamond and emotional pulsar.
• Ensuring brand consistency throughout the event.
• Audience knowledge.
• Uniqueness.
• Developing an emotional pulsar and message.

UNDERSTANDING THE BRAND

Most people think of branding as being some external concept created by some marketing whiz that includes colours, logos and catch phrases. The reality is that branding is much more internal and all encompassing. It is not something created separate from the company, but something which the company represents in all that they do.

Branding can be defined as “Every single interaction a customer has with your business. Plus…how the customer feels about that transaction.” – Philip C. Wrzesinski.

BRANDING: WHAT PEOPLE FEEL ABOUT THE BRAND

In order to be successful at marketing (specifically events), it is critical that the event organiser, the entire marketing department, and everyone involved in the event - understands the brand. If the people designing, developing, implementing and managing the event don’t understand the brand and the brand experience, how can they expect the average person attending the event to understand it?
David Freeman, a screenwriting instructor developed a tool for creating the best characters for movies and television. It involves creating three to five traits for a character that are consistent in every scene throughout the show. This was termed a character diamond.

**A character diamond** is a tool for developing more engaging characters in movies and novels. Each point on the diamond (at least three, but no more than five) represents a distinct character trait—together they define the essence of the character. Those characteristics determine a character's words and actions. Does the character possess a wry wit? Then their words should reflect it. Are they self-conscious and lacking self-esteem? Then, perhaps, they should look down and kick the dirt when they speak.

The character diamond is a filter that shapes the characters words and actions. Screenwriter and teacher, David S. Freeman and author/marketing expert Roy H. Williams have come up with a twist on branding called accelerated branding. The idea is basically to reveal the “character diamond,” create your bottom-line emotional pulse and utilise it on all of your marketing materials consistently.

The brand must have character and it must be representative of the company in order to be successful. Creating a character diamond and emotional pulse and accelerating marketing and branding materials based on these elements, helps gain customer trust—it also helps consumers understand what the organisation “stands for” is passionate about and how to deliver on that passion. By developing and identifying these traits, the event organiser will better be able to deliver brand appropriate event concepts, messages and experiences that line up with the organisations beliefs, traits and core.

The character diamond as mentioned above is the three to five traits that best describes the company/organisation. These are traits that the company/organisation teach, encourage, and nurture. They are entrenched in business culture.

One way to determine the character traits is to consider:

- What part of the business would the organisation never compromise? For Coca – Cola this is “Open Happiness”.
- What absolute truth do they believe about the business? The Hedgehog Event believes that all their event management resources teach, that education is the greatest value and helps learners become more proficient in their jobs and helps them improve, and make better, safer event decisions.
- What do people feel about the company/organisation? When people talk about the company what do they say.

**CREATING THE COMPANY/ORGANISATION’S CHARACTER DIAMOND**

Answer the following questions:

1. What part of the business would you never compromise?
2. What is the passion that drives the company?
3. What absolute truth does the company believe about the brand?
4. How do people feel about the company/organisation?
5. Write down all the traits people have used to describe the company.
6. Write down three things the company does for its customers.

At this stage the company should be able to identify three to five traits = Character Diamond.

Once the organisation has developed their brand character diamond they must ensure that there is consistency across the brand and brand experience.

Consistency is Critical

When consumers come back to a business for repeat sales, they usually expect to receive the same level of quality as they did the first time. Restaurants and their food and service quality are a great example of this.

No one wants to deal with a company they can’t rely on for consistency. With so many industries being saturated with competitors, inconsistency is often enough of a reason for consumers to take their business elsewhere.

That’s why it’s so important to adhere to a certain quality standard with a product or service. An example of a brand who offers amazing consistency is McDonald’s. This powerhouse of the fast food world provides patrons with a menu that’s consistent across the world. Whether someone orders in Johannesburg, Cape Town or London, they know that a Big Mac is going to taste the same. Not only will it taste the same but the brand experience will be consistent.

The event organiser has to learn how to translate the brand into a consistent brand and brand experience. Just because the company is hosting an event does not mean that they forgo the brand and the brand experience. The brand should carry on into the event = consistency.

For Example: The British Airways brand = Doing things properly, treating everyone as an individual and looking the part. They would therefore take the brand traits and convert these into brand appropriate experiences. How would they do this?

If British Airways was involved in Taste of Joburg as a sponsor, it would be expected that the experience one has when flying (doing things properly, treating everyone as an individual and looking the part), would be the same experience a guest should have when they come to the event. The event should mimic the “flying” experience. What the guest expects from British Airways when they fly should be the same consistent experience they get when they attend an event. The event would incorporate elements such as:

- Staff being dressed professionally in suits similar to what air attendants wear = looking the part.
- Their dialogue when greeting guests at the event would be formal = doing things properly.
- Gifts could be individualised and personalised (everyone gets a unique gift according to their interests and hobbies) = individual
- As an invited guest they would not pay for their drinks and food as they would be fully hosted.

The event organiser must evaluate every aspect of their event and marketing strategy to ensure that all parts are consistent and relate back to the character diamond and ultimately the brand. If something does not fit the brand or brand experience – the event organiser must eliminate it.
For Example: Coca – Cola is all about happiness, being for everyone, being innovative “refreshing”. If the event (family fun day) had activities that only adults could take part in, this activity would have to be taken out of the event as it does not fit Coca – Cola’s core belief of being “for everyone”. It would be inconsistent. The event organiser would have to go back to the drawing board to ensure that the activities that are planned for the family fun day include all inclusive activities that children and adults can take part in.

Once the event organiser has combed through the event – ensuring consistency throughout, they will then consider the targeted audience. Knowing one’s audience is a key to event and brand success.

Audience Knowledge

The best brands have a thorough understanding of the demographics of their target market, what their interests are, and how they communicate. Unless it’s a mega chain like Wal-Mart, most businesses have a specific target audience they’re pursuing. Understanding the target market is critical because it provides direction for the tone and reach of the event, along with the overall identity of a brand, while helping to create an organic, human connection between a business and its audience.

Trying to appeal to everyone (i.e., ignoring the concept of a target market) can be counterproductive, causing a company’s brand to become diluted. Finding the right branding approach requires first understanding the target market. When planning events the event organiser must try where possible to ensure that the event experience (theme, message and concept), are appropriate for the target audience.

For Example: An internal year end event for staff of a building company – It may not be the best idea to host a black tie formal dinner as by nature this audience type is casual, informal and prefer to be dressed comfortably. It may more appropriate to offer them an event that is informal, fun and allows them to dress down.

With the volume of competition that businesses face in most industries, it’s never been more important to stand out and develop a unique identity and value proposition through strategic branding. While it’s obviously important to offer a quality product or service, effective branding is often at the heart of the companies that thrive.

Uniqueness

Establishing a brand identity requires something distinctive. For instance, Apple has become known worldwide for their innovative products and minimalistic, aesthetic appeal. When it comes to service companies, Domino’s Pizza used to guarantee that their pizza would arrive in 30 minutes or it’d be free. Event organisers can incorporate these innovations into the events they produce. These event experiences should however be an extension of the marketing campaign.

Creating an identity within a niche doesn’t demand a revolutionary idea. It simply needs to have one special thing that separates it from the competition. In reality, it’s possible to be “a one trick pony” as long as that trick is really good. Once the organisation figures out what that is, it can concentrate on it and should
gain recognition in time. Once you know what makes the brand unique this message can be developed into an event experience.

The Emotional Pulsar

The emotional pulsar is the next concept organisations can utilise to identify the core of the brand. It is one single concept or trait that encompasses every aspect of the character diamond. One concept that can mean many different things to many different people. One ideal that permeates every aspect of the company, product, service and ultimately the event.

Nike created the best emotional pulsar campaign – Just Do It. It means different things to different people and is therefore personal and powerful. The person owns that meaning. They have an emotional connection to “Just Do It”. By developing one overarching concept for the event using the emotional pulsar, the company can ensure that everyone involved in the event has a single, unified understanding of the brand and can therefore deliver a powerful brand experience. One that helps the participants at the event connect with the company, brand and overall message.

BRAND EXPERIENCE

Why do participants attend events? What do they really want?

In simple terms, they want an unbelievable, memorable experience. One that affects their senses, feelings, and cognitions, and evokes positive behavioural responses. No one wants to attend an event that is mind numbingly boring. No matter what type of event, everyone wants to experience something new that takes them out of reality and transfers them into a fantasy. Participants want experiences that make them feel nostalgic, happy, patriotic, moved to tears etc. They want an experience that connects them to the brand in a fun, functional and innovative way.

Nobody wants to go to an event that brainwashes them into believing in the company’s brand. There is a fine line between hard selling the brand and creating memorable experiences. As event organisers it is important to know how to sell the brand message but package it in a fun, entertaining way. In a world where people can experience numerous forms of entertainment from the comfort of their couch – it has become ever more difficult to get them to events. There is so much that competes for their time, money and effort. It is therefore more important than ever to create experiences that gets invitees to take action so they attend the organisations events. Experiences must be designed to be memorable and must knock the socks off their audience.

The purpose for all events is to ultimately make contact with the audience. These audience members may be customers and clients. The aim of all marketing campaigns is to sell or disseminate a message about the company and ultimately the brand. One of the marketing mediums utilised is events and meetings. In order to engage with customers and clients and to disseminate the brand message event organisers have to deliver engaging, dynamic, and memorable event experiences.
This means that instead of people simply coming to events and being ‘spoken to’ or having the company’s brand in their face – organisers must learn how to create memorable experiences so that audiences can subtly experience the brand.

Events should be as interactive as possible and should transform participants from passive to active participants. The more active audience members are the more they absorb information about the brand.

Brand experiences arise in a wide variety of settings when consumers search for, shop for, and consume brands. Yet how exactly do consumers experience a brand? How can researchers and marketing practitioners measure these experiences? Does a consumer’s brand experience affect his or her behavior?

Brand experience is conceptualised as sensations, feelings, cognitions, and behavioral responses evoked by brand-related stimuli. Such stimuli appear as part of a brand’s design and identity, packaging, communications, and environments. It has been said that brand experience affects consumer satisfaction and loyalty.

For an event to be a brand experience, and not a branded event, a defined brand experience needs to be woven across all touch points the brand has with its target audience. It needs to first and foremost appeal to the target audience through their emotional triggers, and then build equity for itself off the things that make it uniquely different to its competitors. Some experiences are “controlled” such as retail environments, products/services, advertising, websites, etc. Some are “uncontrolled”, like journalistic comment and word-of-mouth. Strong brands arise from consistent experiences which combine to shape a clear, differentiated overall brand experience.

It is the event organiser’s responsibility to accumulate/develop the visual, verbal and experiential brand experience. The brand experience encompasses a range of intellectual, sensory and emotional connections. It is the pledged experience. The customer experience must be in close alignment to the brands promise. The success of linking the brand to a brand experience will determine the overall success of the event.

THE PURPOSE OF EVENTS

When event organisers develop, design and implement events they sometimes forget that the purpose behind the actual event is to get BUMS on seat so the organisation can market themselves! Event organisers get so swept up in the décor and the design, that they lose sight of the fact that the event is an extension of the company’s marketing strategy and that the intention is to boost audience numbers. If there are no bums on seats, the company cannot disseminate the brand message.

Events are a marketing tool and need to be treated as such. That means that the purpose of the event is to provide the organisation with a marketing platform; an opportunity to interact and develop a relationship with the customer so as to develop an extended opportunity to sell them the companies message/services or products. That means that before the event organiser starts running the event they need to consider what type of experience they want people to have at the event linked back to the brand.
When the public see the branding i.e. the companies billboards, advertising, brochures etc., the logo (brand) does not have an emotive, direct impact on them. The billboard is inanimate and does not have any real tangible effects. The public may take note of the advert but they cannot interact with it. Therefore there is no real experience from this type of advertising.

Events therefore offer a direct experience; they allow participants an opportunity to “experience” the brand. If this is done correctly, this can assist in building customer relationships. The goal here is to develop long lasting relationships with customers that ultimately lead to long term customer loyalty and return on investment.

**SUMMARY**

Understanding the relationship between marketing, event management and event marketing is crucial if the event organiser is to deliver powerful events that disseminate the brand message. Having an understanding of how to manipulate elements of the marketing mix; and an understanding of the brand and brand experience, will help achieve the organisation’s goals and help gain the competitive edge when delivering events.

It is also crucial that the event organiser understands the concepts pertaining to character diamonds and emotional pulsars, and how to use these when developing events.

It was discussed in the text above, that the greatest brands in the world have one thing in common – they know who they are, what they are best at, and they consistently deliver on their promise. It is therefore the event organiser’s responsibility to ensure that everyone involved in the event understands the brand and the objective of the event. The objective in a nutshell, is for an event to be a brand experience, and not a branded event.
The Event Management Process

Understanding the Four Event Management Concepts
COVERED IN THIS SECTION:

THE NINE STEPS TO MANAGING AN EVENT
ADMOR DOMAINS
WHS
SIX STAKEHOLDERS
CHAPTER 2: THE EVENT MANAGEMENT PROCESS

INTRODUCTION

Before you can start designing, implementing and managing events there are four important event management concepts that need to be understood. These form the basis of not only event management but in understanding risk and event compliance. The four concepts are outlined below namely Concept One: *The nine steps to managing an event*, Concept Two: ADMOR, Concept Three: WHS and lastly Concept Four: Event Stakeholders.

The risk in event risk management is that few event organisers have an event framework or process they can follow for their events. They may plan their events in a haphazard manner working without a clear step by step blueprint. Having a clear and simple step by step framework will not only ensure that you cover all the event planning areas but that you consider the risks and hazards throughout in the same consistent manner. These event management concepts can be used to extract, identify and isolate potential risks and hazards.

CONCEPT 1: THE NINE STEPS TO MANAGING AN EVENT

Step 1 Discovery  
Step 2 Research and Development  
Step 3 Proposal Delivery  
Step 4 Confirmation Stage Gate  
Step 5 Planning and Design  
Step 6 Approval Stage Gate  
Step 7 Implementation  
Step 8 Project Execution  
Step 9 Closure

In order to be successful ensure that you have a sequential event framework or roadmap from which to work. This framework should outline what steps are involved in an event and in what order they need to be completed. We have provided this framework for you.

The benefits of this are:

- That there will be a clear direction – you will know where to start and finish.
- No crucial elements will be omitted.
- The framework formalises the event management process for everyone involved.
The figure below depicts the nine steps that are required to conceptualise, design, develop, implement and manage an event. This is the event framework. It ensures that no area of the event is overlooked. Every/all events are made up of these nine steps. These need to be followed consistently and systematically. Within an events risk and compliance framework you would consider areas of risk and non-compliance in each step. Each step is explained more thoroughly.

[Refer to Event Management Smart Event Process Cheat Sheet – Mindmap]

**STEP 1: DISCOVERY**

**Discovery** is the critical first step in the event management process. This is when the event organiser is commissioned/ notified about the event by the client and event organiser will discover and identify the what, when, where, when and how of the event. These requirements ultimately become the expression of work to be performed (known as project scope).

At this step one would need to investigate and discover:
- Whether the client, the vendors, the venue and the speakers themselves are compliant?
- What potential risks could occur with the interview with the client, in the administration, design, marketing and operations domains?
- Whether the event is feasible? Etc.
The discovery step includes:
Request for Proposal
Client Interview Review
Administration:
- Procurement Management Plan
- Identify Stakeholders
- Information Management Requirements
- Project Duration
- Human Resource Discovery
- Quality Management Plan
- Cost Discovery
Design:
- Concept Discovery
- Content Discovery
- Program Discovery
- Invitation Discovery
- Environment Requirements
- Production Requirements
- Entertainment Requirements
- Promotions Requirements
- Catering Requirements
Marketing:
- Marketing Requirements
- Invitation Requirements
- Materials Requirements
- Merchandising Requirements
- Promotions Requirements
- Public Relations Requirements
- Sponsorship Opportunities

Operations:
- Attendee Requirements
- Brand Requirements
- Communication Requirements
- Content Requirements
- Entertainment Requirements
- Infrastructure Requirements
- Logistics Requirements
- Production Requirements
- Site Requirements
- Speaker Requirements
- Technical Requirements
- Housing Requirements
- Way Finding Requirements
- Catering Requirements

Risk:
- Event Compliance
- Pre - Feasibility Study
- Document Management

STEP 2: RESEARCH AND DEVELOPMENT

Research and development refers to the investigative effort required to create a new product (event). It includes the exploration phase that determines the viability of the project and methods for proceeding as well as all the design and manufacturing stages required to yield a working product (event). With regards to event compliance and risk management at this step we would need to research the six stakeholders namely The Client, The Company, The Customer, The Vendor, The Venue and The Speakers. The research would include discovering whether they are compliant; as well as what risks they pose; and what risks they themselves have identified on the project. The Event Organiser/Event Management Company would then need to develop a compliance management and risk strategy which would demonstrate how everyone on the project will ensure they are compliant and a risk assessment of risk areas.

The research and development step includes:
Brand Research
- Document Maintenance
- Develop Event: ADMOR
- Develop Concept
- Develop Scope Plan
- Research Procurement & Solicitation Process
Administration Research:
- Research Stakeholders
- Research Info. Man. Requirements
- R & D Duration
- Availability of HR
- Research Costing
Event Design Research:
- Concept and Theme
- Content
- Program
- Invitation
- Environment
- Production
- Entertainment
- Promotions
- Catering
Marketing Research:
- Marketing Requirements
- Invitation Requirements
- Materials Requirements
- Merchandising Requirements
- Promotions Requirements
- Public Relations Requirements
- Sponsorship Opportunities
Operations Research:
- Attendee
- Brand
- Communication
- Content
- Entertainment
- Infrastructure
- Logistics
- Production
- Site
- Speaker
- Technical
- Housing
- Way Finding
- Catering
Risk Research

STEP 3: PROPOSAL DELIVERY
The proposal delivery stage is when an event strategy proposal is compiled and written. The event proposal contains the framework from which the event will be developed, designed, implemented and managed. It defines the event concept and demonstrates how this will be integrated throughout. The proposal will culminate into a presentation that will be pitched to The Client. With regards to event compliance and risk management at this step we would propose to The Client what areas of risk we have identified and then we would propose how we aim to mitigate, reduce or manage the risk to ensure total event compliance throughout all 9 steps as well as for all stakeholders.

The proposal step includes:

- Proposed Feasibility
- Brand Integration Proposal
- Initial Contracts
- Proposed Administration Management:
  - Proposed Scope
  - Proposed Solicitation Plan
  - Identified Stakeholders
  - Proposed IM Plan
  - Proposal/Pitch Duration
  - Human Resource Proposal
  - Cost Proposal
- Proposed Design Management
- Proposed Marketing Management
- Proposed Operations Management
- Proposed Risk Management

STEP 4: CONFIRMATION STAGE GATE

The confirmation stage gate is the stage used to describe a point in a project or plan at which development can be examined and any important changes or decisions relating to costs, resources, profits, etc. can be made before moving onto the planning and design stage. The Client will confirm that they are satisfied with the initial concept and proposed event strategy. Changes and modifications can be made until Step 6.

If you cannot get sign off at this stage you cannot move onto planning and design step; or if you do move onto Step 5 and 6 without the necessary approvals and scope confirmation you may find scope creeps and scope changes which could impact you financially or open you up to liabilities and non-compliance issues.

The confirmation stage gate step includes:

- Confirmation of Project
- Brand Management Confirmation
- Document Confirmation
- Confirmation Of Go Ahead: ADMOR Plan
- Verification of Scope
- Budget Confirmation
- Proposed Administration Confirmation
- Proposed Design Confirmation
- Proposed Marketing Confirmation
- Proposed Operations Confirmation
- Proposed Risk Confirmation

With regards to event compliance and risk management at this step we would confirm with The Client that they are satisfied with the risk and compliance management strategy we have proposed and that we can move onto the planning and design stage.
At the confirmation stage risk could be present if the event organiser does not attain sign off and confirmation for:

- Final quantities or pax.
- Date and location for the event.
- Budget.
- Timing schedule.
- Administration.
- Design.
- Marketing.
- Operations.
- Risk management.
- Concept.

**STEP 5: PLANNING AND DESIGN**

Planning and design is the process of managing the project. Event planning includes budgeting, establishing timelines, selecting and reserving the event sites, acquiring permits, planning food, coordinating transportation, developing a theme, arranging for activities, selecting speakers and keynotes, arranging for equipment and facilities, managing risk, and developing contingency plans.

With regards to event compliance and risk management at this step we would establish risk policies, compliance strategies and ensure that we have considered the risk areas within our design. Identify possible risks, hazards, threats and vulnerabilities.

The planning and design step includes:
- Brand CI
- Document Management
- Administration Strategy Finalised:
  - Scope Planning Document Finalised
  - Stakeholders Plan Finalised
  - IM Plan Finalised
  - Planning Duration
  - Human Resource Planning Strategy Finalised
  - Financial Planning Finalised
- Design Strategy Finalised
- Marketing Strategy Finalised
- Operations Strategy Finalised
- Risk Strategy Finalised

**STEP 6: APPROVAL STAGE GATE**

The approval stage gate is the phase wherein the requirements and specifications for the event project are determined, specifying the activities that will occur, how efforts will be organised, the resources that will be required, and the context, conditions, or assumptions that affect the decisions to be made. This is the stage used to describe a point in a project or plan at which planning and design can be examined and any important changes or decisions relating to costs, resources, profits, etc. can be made before moving onto the implementation stage.
The approval stage gate step includes:

- Brand Approval
- Document Approval
- Administration Strategy Approval:
  - Scope Approval
  - Source Approval
  - Approved Stakeholders Stage Gate
  - Approved IM Plan
  - Activity Approval
- Design Strategy Approval
- Marketing Strategy Approval
- Operations Strategy Approval
- Risk Strategy Approval

With regards to event compliance and risk management at this step The Client would approve all final risk and compliance management strategies so that we can start implementing them.

They would need to approve that the following can be implemented according to the signed off scope:

- Approved quantities/pax.
- Approved date and location.
- Approved venue and site requirements.
- Approved vendors.
- Approved budget.
- Approved schedules.
- Approved administration.
- Approved design management strategy.
- Approved marketing management strategy.
- Approved operations management strategy.
- Approved risk management strategy.

Once approval has been signed off, only then can the event organiser move onto Step 7: Implementation.

**STEP 7: IMPLEMENTATION**

**Implementation** is the phase where all the goods and services are contracted and coordinated. It also involves synchronizing all the operational and logistical requirements of an event project. With regards to event compliance and risk management at this step we would ensure that all operational and logistical risk and compliance strategies have been implemented and that all necessary event compliance documentation has been prepared and are ready to be executed.

The implementation step includes:

- Invitation Execution
- Brand Management
- Briefings & Training
- Document Implementation:
  - Event Execution Document Completed
  - Set up Schedule
  - Breakdown Schedule
  - AV Cue Sheet
  - Venue Function Sheet
  - Contracts Completed
- Administration Completed:
  - Scope Completed
  - Implement + Control IM Plan

  Time Man. Schedules Completed
  Human Resource Man. Completed
  Payments Completed

  Design Completed
  Marketing Completed
  Operations Completed
  Risk Completed
STEP 8: PROJECT EXECUTION

The project execution phase involves event plans and strategies being carried out. The executing process consists of those processes performed to complete the work defined in the project management plan to satisfy the project specification.

With regards to event compliance and risk management at this step we would need to ensure that everyone on site at the event is safe and secure and should unforeseen disasters, circumstances occur that everyone knows how to respond and react to said risks.

The execution step includes:

- Event Operations Management
- Event Operations Manual
- Set up & Break Down Schedules
- Loading Bay Schedules
- AV Cue Sheets
- Food & Beverage Matrix
- Design Execution
- Marketing Execution
- Operations Execution
- Risk Management

STEP 9: CLOSURE

The closing phase consists of those processes performed to conclude all activities across all project management phases to formally complete the project, phase, or contractual obligations.

With regards to event compliance and risk management the organiser would evaluate what risks were identified throughout the project, what risks materialised and what lessons were learnt.

The closure step includes:

- Brand Evaluation
- Document Closure
- Contract Closure
- Objectives Evaluation
- Administration Evaluation & Closure:
  - Procurement Closure
  - Stakeholders Evaluation & Feedback
  - IM Evaluation
  - Time Management Evaluation
  - Human Resource Performance
  - Cost Closure
- Design Evaluation & Closure:
  - Concept Evaluation & Closure
  - Catering Evaluation & Closure
  - Marketing Plan Evaluation & Closure
  - Operations Evaluation & Closure
  - Risk Evaluation & Closure:
    - Evaluate Incidents
    - Risk Evaluation & Closure
  - Event Evaluation Report & Feedback
  - Lessons Learnt
  - Closure Report

CONCEPT 2: ADMOR (ACRONYM)

INTRODUCTION

Within each event step there are five further domains that must be considered namely the Administration, Design, Marketing, Operations and Risk domain (referred to as ADMOR).

The domains facet represents the overarching areas of activity or functions within events management. They illustrate the full scope of the responsibilities assigned to the event organiser. The areas that need to be managed in an event can be broken down into these (ADMOR) domains.
THE ADMINISTRATION DOMAIN

The Administration Domain deals primarily with the proper allocation, direction, and control of the resources used in an event project. Since resources are finite by definition, it is imperative that they be acquired, developed, and utilised in the most efficient and effective manner to benefit the event project.

Administration comprises of the following areas:
→ Procurement.
→ Stakeholder management.
→ Information management.
→ Time management.
→ Human resource management.
→ Quality management.
→ Cost management.

THE DESIGN DOMAIN

The Design Domain focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions. The elements developed within each functional area combine to create the event experience encounter that will either be enjoyed or endured.

Design comprises of the following areas:
→ Concept and theme design.
→ Catering design.
→ Content design.
→ Program design.
→ Invitation design.
→ Environment design.
→ Production design.
→ Entertainment design.
→ Promotions design.

THE MARKETING DOMAIN

The Marketing Domain addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. The nature of the event as an “experience” necessitates a thorough understanding of the unique buyer-seller relationship associated with this intangible product.

Marketing comprises of the following areas:
→ Marketing requirements.
→ Invitation management.
→ Materials management.
→ Merchandising management.
→ Promotions management.
→ Public Relations management.
→ Sponsorships management.

THE OPERATIONS DOMAIN

The Operations Domain concentrates on the people, products, equipment, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and manoeuvres associated with each. Impeccable coordination is required in order to manage this symphony (or cacophony) of logistical and functional requirements and expectations.
Operations comprises of the following areas:

→ Attendee management.
→ Brand management.
→ Content management.
→ Entertainment management.
→ Infrastructure management.
→ Logistics management.
→ Production management.
→ Site management.
→ Speaker management.
→ Technical management.
→ Housing management.
→ Way finding management.
→ Catering management.

THE RISK DOMAIN

The Risk Domain deals with the protective obligations, opportunities, and legalities traditionally associated with any enterprise, including an event project.

These areas are inextricably linked with every choice made and all activities conducted, and are increasingly mandated by stakeholders ranging from regulatory authorities to discriminating event consumers.

Risk comprises of:

→ Risk assessment.
→ Decision management.
→ Compliance management.
→ Disaster management.
→ Legal management.
→ Health and safety management.
→ Security management.
→ Emergency management.
→ Event insurance management.

For Example:

• **Within Step 1: Discovery** – The event organiser would need to identify “discover” the administration, design, marketing, operational, risk requirements of the event project.

• **Step 2: Research and Development** – The event organiser would research what administration procedures would need to be in place. They would research what the design will be i.e. what will the concept be, researching ideas etc. and then they would develop a design strategy. They would research what needs to be done in marketing, what operational requirements there are, and what risks could potentially occur at the event. Etc.

• **Step 5: Planning and Design** – The event organiser would strategise and plan for administration, design, marketing, operations, risk in this step. Etc. This would be done for all steps as per the diagram above.
Figure 4: The Nine Steps to Managing an Event including ADMOR domains.

Figure 5: Within each of the 9 event steps & the ADMOR Domains consider: The Client, The Company, The Customer, The Vendor, The Venue and The Speakers requirements (CCCVVS) as well as the WHs.
CONCEPT 3: THE SCOPE WHS

It is also important to consider the WHAT, WHY, WHO, WHERE, HOW, WHEN AND WHAT IF for each and every event step throughout each domain. This helps determine the project scope.

Figure 6: Event WHs

Scope WHs: Questions whose answers are considered in order to gather basic in information about the project.

WHAT: The first W to be considered in order to determine the context of the event is the WHAT. This Refers to what the scope of the project is.

WHY: Is the purpose and objectives of the project? It follows the What. WHY is the reason behind every decision. Why is the event taking place? The purpose and the benefits? Does the organisation want to educate? Entertain? Inform? Inspire? The Why will also consider if the event is feasible/doable.

WHO: Once the What and the Why are known consider the WHO. Who will complete the project, who is the event for? Etc. It provides key information about the audience or guest profile, and the solicitation of suppliers. Who are the parties involved in the event? Who is going to support the event project internally? First thing to do is to know who are the internal stakeholders are and their roles in the event process. The second step to consider is which external stakeholders are going to participate and support the event? Here is a long list including, media, key partners, politicians, brand ambassadors and a long etcetera. These are the stakeholders of the event (internal and external).

WHERE: Provides the information on location and assists with logistical parameters. WHERE the event should be held. Determine if the location selected is appropriate for the targeted audience. It is the site or venue.

HOW: Determines the resources required and in what way, manner tasks and activities will be completed. Determine organisational resources to produce the maximum benefit for the stakeholders. This is best determined through a SWOT Analysis.

WHEN: Refers to at or on which date, time task/activity will be completed. When should the event take place? You should set specific dates for the event. To do this, take into account the time needed for the research. Adapt the schedule to the needs of the audience, and see if the best option is to continue with the initial dates taking into account other variables such as weather, local events, special dates and local holidays, etc.

WHAT IF: Signifies possible contingency plans. WHAT IF no one attends? What if too many people show up? Etc.
CONCEPT 4: THE SIX EVENT STAKEHOLDERS

![Diagram of the six event stakeholders]

Figure 7: The Six Event Stakeholders (Referred to as CCCVVS)

Before meeting objectives can be established, the stakeholders of a meeting or event must be identified and their needs, desires and challenges established through a needs assessment process. Stakeholders are all the individuals who are invested in a project or event such as the sponsors, attendees, vendors, media and others.

There are six stakeholder groups that need to be considered throughout the entire event project. For every one action you take you must consider the needs and expectations of The Client, The Company, The Customer, The Vendors, The Venue and The Speakers. By considering all 6 groups of stakeholder’s needs and requirements the event is more likely to be successful. Using CCCVVS (The Client, The Company, The Customer, The Vendor, The Venue and The Speaker) as a checklist for every one action performed will ensure that all requirements are met and planned for.

For Example: If the action required is booking accommodation - consider whether the client needs accommodation; whether the event organiser’s staff will require accommodation; whether the customers need accommodation; whether the vendors need accommodation; and finally whether the speakers need accommodation. It is clear from this example that all six stakeholder groups have been considered.

CLIENT: This refers to the person who is commissioning the event. The event organiser will firstly have to know who the client is, what their requirements are for the event and what their brand/brand experience is. The client can be both an internal client and an external client.

For Example: If an event management company is commissioned to manage the event their client would be external. However if the event organiser is a planner within a company and their boss, manager, department head etc. requires them to run/host an event - their client is internal.

However in both instances the event organiser must treat the client as such and keep the relationship professional. They must ensure that they do not make the process informal as this is when things fall through the cracks. Whether the client is internal or external the event organiser must follow the same steps outlined in this resource.

COMPANY: This is the company the event organiser works for (if the client is internal) or the event management company commissioned to project manage the event (if the client is external). Also referred to as the event organiser.

CUSTOMER: Refers to the third – party person who is attending the event (attendee, employee, guest, invitee, delegate etc.).

VENDOR: Refers to all suppliers commissioned for the event for example Audio Visual, technical, catering, entertainment and general suppliers etc.

VENUE: This is the event site where the event will be held. This may be a temporary site like a marquee or a fixed site like a venue. Before booking a venue or event site consider which vendors will be solicited. The reason being that if the event requires draping, lighting and staging it would logical to first know WHAT the technical teams requirements are for the event before confirming the venue/site.
For Example: The production and technical vendor may require a certain height ceiling for the raising of trussing systems and audio visual equipment. If the venue has already been booked the event organiser might find out too late that the ceiling is too low and they cannot suspend the equipment they need to. This will limit the event’s success.

Before booking the venue/site, the event organiser must first ascertain what needs to be done and by whom before considering the site. The benefit of knowing which suppliers and vendors will be part of the event before securing a venue is that they can attend the site visit with the organiser. They will be able to ensure that their requirements are met at the venue which ultimately assists the organiser in the long run. The last thing the organiser would want is to book a venue only to learn that the solicited vendors cannot perform or deliver their scope due to restrictions and limitations.

**SPEAKERS:** Refers to anyone who addresses the audience or conducts speeches for example A Chairperson, CEO, Company Representative, MC, keynote, contributor, facilitator etc. Lastly, we would consider which entertainers and speakers to use.

Here is one last example of how to utilise CCCVVS:

**For Example:** When ordering food and beverages at the venue the organisation would plan and manage the requirements by indicating whether the client, the company, the customer, the vendor, the speakers would require food and beverages. If one simply sent The Venue the total number of delegates attending the conference one might find that the total number of people attending is 100. However on closer inspection when utilising CCCVVS as a checklist, it is discovered that in fact a number of people fall into the staff, speaker and vendor category and they may not require a full meal at full price. By indicating how the numbers are made up; by indicating how many customers, vendors, speakers and staff, not only saves money but shows immense attention to detail.

If ordering food and beverages for a conference the venue would charge a DCP (Daily Conference Package) per person. The DCP would include morning teas and coffees, mid-morning teas and coffees, snacks, lunch and afternoon teas and coffees. It would not be efficient to include vendors and staff under the Daily Conference Package as the price may be R550 per person. The vendors may only require crew lunch and two beverages. It would therefore be beneficial to negotiate with the venue a separate crew meal for staff and crew as they will not require three tea and coffee breaks, full lunch etc.

**SUMMARY**

Before the event organiser can start designing, implementing and managing an event they must understand and comprehend the four concepts discussed above. Understanding these concepts will help you identify the processes, domains and stakeholder requirements involved in the event project.

Using the nine steps framework will ensure a clear starting point from which to work. Understanding the domains within each of these steps, as well as understanding which stakeholders will be involved in the event will not only reduce risks but will ultimately ensure event success.
Step One

Discovery Phase
COVERED IN THIS SECTION:

THE PURPOSE OF DISCOVERY
CLIENT REQUEST FOR PROPOSAL OR QUOTATION
THE CLIENT BRIEF
NEEDS ASSESSMENT
THE CLIENT INTERVIEW
SPECIFYING THE EVENT GOALS AND OBJECTIVES
SUMMARY
CHAPTER 3: STEP ONE - DISCOVERY

THE PURPOSE OF DISCOVERY

*Discovery* is a stage, not a meeting. When the organisation first starts to think about and discuss a potential project, this is the discovery stage. Discovery activities include sharing ideas, concepts, and potential solutions to requests, problems, or suggestions. This is the first step in the event management process. A process implies that there is a predetermined sequence of steps that will result in a specific outcome.

The purpose of the discovery phase is to manage time, energy and budget wisely and to evaluate the scope of the project based on the client’s needs, expectations and scope requirements.

The discovery stage is as important to event management as the foundation of house is to building a structure. If the organiser does not discover from the outset what the client’s needs and requirements are, if aspects such as the purpose of the event, the objective for hosting attendees, who the attendees are etc. are overlooked, the foundation will be unstable.

Understanding the scope of the project and what will be required must be investigated thoroughly before moving onto the “doing”. Most event organisers hit the ground running and don’t take time to “discover” what is required in its totality. They are too concerned with getting things done. In the long run overlooking or leaving this step out will result in the failure of the project or it will reveal “cracks in the house”.

Building (developing) an event is like building a house. The foundation of the “house” needs to be well thought out from conceptualising to materialising the “house”. This step is as important as every other step and must be completed before you begin planning the event.

CLIENT REQUEST FOR PROPOSAL OR QUOTATION (RFP OR RFQ)

The first step in the discovery stage is the Request for Proposal (RFP). This is when the client first communicates with the event organiser about the need for an event. This may include a full brief for the event or it may simply be an email notifying you that they wish you to run an event. The RFP may be a formal or semi-formal exercise depending on your client – whether they are internal or external.

THE CLIENT BRIEF

The better the brief, the better and more accurate the results.

*The client brief* is a statement of the problem/opportunity. Emphasis should therefore be on clarity and a succinct summation of the brand’s current position, its marketing strategy and where it wants to get to.

A brief is the most important piece of information issued by a client to the event organiser and as such the client brief should always be written by the client as it's from the brief that everything else flows. It is
therefore essential that every effort be taken to prepare the best possible documentation of what is required. All too often clients send briefs that are limited in information, don’t indicate the goals and objectives of the projects, or that simply don’t indicate what will be required.

The biggest waste of resources is to put event organisers through the process of developing a solution repeatedly without concrete direction. It wears on relationships and is costly in wasted staff time (on both sides).

THE PRINCIPLES BEHIND A GOOD BRIEF

There is remarkable consensus amongst clients and agencies about what makes a good brief.

There are three key areas:

1. **Written Briefs.** It is preferred that clients provide organisers with a written brief because this forces the client to consider their request. The discipline of writing a brief ensures some rigour on their part. The opportunity to discuss this at a subsequent verbal briefing usually allows us to cover any inconsistencies and, if necessary, develop focus through mutual agreement. A written brief is also vital in ensuring the ‘buy-in’ of other key people in your company. This buy-in is essential in order to avoid the significant waste of time and resources that can happen when senior executives – often outside the marketing department – challenge key assumptions in the brief, leading to belated changes in direction.

2. **Clarity Of Thinking.** A good brief is not the longest or most detailed, it’s the one whose clarity and focus creates the platform for a great strategic leap, a blinding customer insight and an effective solution. Briefs are called ‘briefs’ because they are meant to be brief. They are a summation of your thinking. Encourage the client to attach all relevant supporting information as appendices.

3. **Clearly Defined Objectives.** Start by making sure that the objectives are crystal clear. Use concrete business objectives rather than vague terms such as ‘to improve brand image’. (And remember, every objective starts with the word ‘to’…). If the objective is indeed to improve the brand image, then go further. Explain the desired improvement that the organisation wants to achieve. From what to what? What will it do for the business?

Once the client brief has been received, the next step is to conduct a needs assessment which will include ascertaining what the Client’s needs and requirements are for the project. The Client Interview probes deeper into the scope of the event project and WHAT will be required by WHO, WHEN AND WHY.

NEEDS ASSESSMENT

In order to determine needs, send out a survey or interview the stakeholders, asking them the 5 W questions to ensure their needs are satisfied in line with your creative solutions. Once the stakeholders’ needs are assessed and analysis confirms that their answers are in line with creative plans, the event organiser can confirm the final feasibility of the event design.

THE IMPORTANCE OF NEED ASSESSMENTS
An event without a goal is purposeless. A need assessment offers the foundation needed to create a vision for the event and identifies what the return on investment will be for the client.

The initial conversations with the client will typically record the following information:

- What is the client’s contact information?
- What are the client’s goals for the event?
- What type of client is it?
- What is the event’s profile?
- What are the client’s goals?
- What does the client have to lose or gain with the success of the event?
- What level of experience does the client have?
- May the client be contacted with questions directly, or an appointed person?
- How will the client participate in the meetings?
- Who makes the final decisions?
- Who is the point person responsible for approving changes during the event?
- What are the presenters’ requirements?
- What are the presenters’ equipment needs?
- What size is the event?
- Is the event a conference or meeting, or does it include an exhibition?
- What is the general event schedule?
- What is the attendee profile?
- How many staff members will work at the event?

Initiating an event can be a long process, which will vary, depending on the amount of assistance the client requires. One may sit in a six-hour meeting and only answer two questions. The information gathered at the meeting will help throughout the event process. The quality of the information collected in these initial contacts can provide a strong base for the rest of the event planning process.

THE CLIENT INTERVIEW

INTRODUCTION

The Client Interview takes place in Step 1: Discovery. This is the critical first step in the event management process. This is when the event organiser is commissioned/notified about the event by the client and the event organiser will discover and identify the WHAT, WHEN, WHERE, WHEN AND HOW OF THE EVENT.

The Client Interview is the first meeting they will have with a prospective client. It allows the event organiser the opportunity to ascertain what work will need to be performed. Knowledge will be transferred from the client to the event organiser. During this interview, the client will outline the event he/she has in mind. In turn, you will assess the event, check your calendar, and offer possibilities. This initial meeting allows the client a chance to interview the event organiser (if an external company).
Before starting to plan and develop an event it is crucial that the event organiser know what is included in the scope. The Client Interview Form is a tool that can be used during the interview/meeting to determine the scope of the project.

THE CLIENT INTERVIEW FORM

*The Client Interview Form* will assist in identifying the event’s overall purpose. It serves as a pre – planning event checklist and outlines the expectations of the client. It will help set event criteria for post event evaluation and measurement.

This form is very detailed and asks focused, detailed questions. The process of interviewing the client (using this form), should only take 30 – 45 minutes. It will ensure the event organiser stays on topic and that they get all the necessary information needed to prepare a proposal or event strategy.

**The C.I.F (Client Interview Form) covers all the WH’s:**

<table>
<thead>
<tr>
<th>WHY</th>
<th>The purpose of the event.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO</td>
<td>Provides the audience or guest profile.</td>
</tr>
<tr>
<td>WHERE AND WHEN</td>
<td>Provides the logistical parameters.</td>
</tr>
<tr>
<td>WHAT</td>
<td>Determines the event context and content.</td>
</tr>
<tr>
<td>HOW determines HOW MUCH</td>
<td>How much (resources).</td>
</tr>
<tr>
<td>WHICH WAY</td>
<td>Direction and focus.</td>
</tr>
<tr>
<td>WHAT IF</td>
<td>Contingency plans.</td>
</tr>
</tbody>
</table>

The Client Interview Form will navigate The Client through all areas of the event.

**Benefits of using the client interview form:**

- Assists in identifying the event’s overall purpose.
- It serves as a pre – planning event checklist and outlines the expectations of the client.
- It helps set event criteria for post event evaluation and measurement.
- It ensures that targeted, specific questions are asked so that the event organiser doesn’t stray from the most important topics and focuses on the finer details relating to the event e.g. insurance, budget provisions, marketing etc.
- This form gives direction and allows the event organiser to take on the role of expert (interviewer).

Event organisation can become a cumbersome process if not taken seriously. Thoroughly combing over as many details as possible is a great maneuver aimed at presenting an event worthy of remembering. Details make a difference.
Here are a few examples of the types of considerations required for the event. These would be identified upon interviewing the client.

- How should the guests feel upon arrival and departure?
- Would all guests remain together during the event or would they divide into smaller groups at some point during the experience?
- Should they experience emotions of comfort, excitement, relaxation, romance, restfulness or pleasure?
- Is the nature of the event casual, formal, romantic, or professional?
- How will guests arrive?
- Will parking be an issue or inconvenience?
- How far will guests be willing to travel to reach their destination?
- Does the event facility provide a catering service, technological equipment, DJ/music or will it permit the use of such on its premises?
- How many guests will be attending the event and will the desired location accommodate this number of attendees?

These are just some of the questions to consider when interviewing the client.

**HOW TO USE THIS RESOURCE**

- Before the organiser sets up the meeting with the client they can email The Client Interview Form to The Client so they are prepared for the meeting and know what information they will need to supply. This may also serve as an agenda of items to be discussed.
- The document must be signed at the end of the meeting to ensure that all information is correct.

The Client Interview Form contains questions pertaining to the following:

* Please note that the template available for this is in a more user friendly format.

<table>
<thead>
<tr>
<th>Primary Contact Person</th>
<th>Indicate who the client’s representative is, who has authority to communicate to the event organiser etc. Contact details: Capture contact information such as the contact’s name, address, organisation type and email address. In this section it is also crucial to find out who the end client is, the reporting structure, key influencers and stakeholders as well as who will be involved with the event. Request the company’s organogram.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Frame</td>
<td>How long does the event organiser have to develop, design, implement and deliver the event? Time frame from beginning to end.</td>
</tr>
</tbody>
</table>

*Table 1: The Client Interview*
<table>
<thead>
<tr>
<th>Event Name</th>
<th>Does the event have a name or must the event organiser develop a concept, theme and name?</th>
</tr>
</thead>
</table>
| **Date (s)/ Length of Program/ Start Time/ End Time** | **When:** Consider the time of year, including the consequences of extreme weather conditions at an outside event. The day of the week and time will also need consideration regarding the nature of the event, noise and ease of travel etc. The event should not clash with any other major events in the area.  
  **Day:** Many events are centered on leisure activities and as such will attract an audience only if they are held during leisure time. This automatically restricts the days on which leisure events can be held to days when most people are not working – Saturday, Sunday or an occasional Public Holiday or Friday. Similarly, a work – related event such as an office furniture show will probably attract a better audience if it is run on a weekday.  
  **Date:** The date is unique as well. Some events will be limited to a specific period.  
  **Time:** The expected opening and closing timing is important. Take into account the size and type of event, the time it will take stallholders and exhibitors to travel in and prepare their displays, the geographical distance audience will be traveling, access to the site and the availability of public transport etc. Choose opening hours to maximize the period during which the paying public can gain access and spend money. |
| **Proposed Budget** | **Financial input:** How much money is available for the delivery of the event?  
Budgeting for an event is by far the most important aspect of a successful event. While budgets can be as varied as the occasions being planned for, a budget lays the groundwork for what can be included in the event, what details must be scaled back, and what ideas must be abandoned during the planning process.  
Factors to be considered are deposits for event venues, speakers, caterers, photographers, bands, DJs, fireworks, audio-video and sound equipment, furnishings, rented lighting, limousines, floral displays, booth standards and panels, portable dance floors, stages, and printing services.  
If advertising and promotion are part of the event equation, funds will have to be allocated to newspaper, radio, and television advertising as well as contracting the services of writers, actors, voiceover talent, photographers, videographers, ticket master services and website marketing.  
Event personnel and payment for such services must also be included. These should cover security and information desk staff, food servers, bartenders, valets or parking attendants, set up and breaks down workers, sanitation crews and drivers for transporting people and equipment to and from the event location.  
Other expenses to consider are gifts, signage, banners, posters, carpet runners, money to cover lodging and transportation of speakers and event personnel, special uniforms, cell phones, internet access to the event, special music CDs and the services of professional decorators, event and space planners.  
Even the most carefully crafted budget is prone to the need to cover last-minute surprises or overlooked necessities. Rule of thumb suggests an additional 10-15% above and beyond anticipated costs be allocated for unexpected expenses.  
Before putting together an event, the event organiser must know what the budget is. The following questions are important to ask:  
• What expense range are they considering?  
• What does the expense budget include and exclude?  
• Is the organisation responsible for allocating vendors?  
• Is insurance coverage in place?  
• Payment policies? |

**Table 1: The Client Interview Continued**
<table>
<thead>
<tr>
<th>Attendance No.</th>
<th>Audience Size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>It is important to help the client figure out how many people to invite to the meeting or event. This conversation will occur during the client interview stage. The number of attendees needs to fit the type of event. For example, if the company was hosting a meeting or workshop they would only invite up to about 15 people. Any more than that and the purpose and objectives for this type of event could not be met adequately.</td>
</tr>
<tr>
<td></td>
<td>Many arrangements for planning hinge on the size of the audience. Concentrate on generating an accurate estimate of the number of people who will attend. The larger the event the more imperative it is that you invest time and effort in getting it right.</td>
</tr>
<tr>
<td></td>
<td>Underestimating Attendance</td>
</tr>
<tr>
<td></td>
<td>Underestimating attendance could cause major problems. If too many people arrive your event site may not be large enough to accommodate them. There could be insufficient facilities and there may be breaches in compliance.</td>
</tr>
<tr>
<td></td>
<td>Overestimating Attendance</td>
</tr>
<tr>
<td></td>
<td>Similarly overestimating attendance will also cause problems. If less than the planned number arrives, the company would have wasted money on unnecessary and unused facilities and staff and they would incur a significant financial loss.</td>
</tr>
<tr>
<td></td>
<td>Accurate Estimates</td>
</tr>
<tr>
<td></td>
<td>Don’t skip or rush this stage. It is important to ensure that the attendance figures are accurate. History and research will help accurately predict expected audience size. If one goes back to previous events of a similar size and type they will see how many people were invited versus how many people showed on the day of the event. Capture this information after every event so that predicting numbers is not based on uneducated guess work. Look at previous years’ attendance and research similar event attendance.</td>
</tr>
<tr>
<td></td>
<td>Also consider the following factors that will affect expected attendance rates:</td>
</tr>
<tr>
<td></td>
<td>• Time/venue limits.</td>
</tr>
<tr>
<td></td>
<td>• Restricted and prescribed attendance.</td>
</tr>
<tr>
<td></td>
<td>• The economy.</td>
</tr>
<tr>
<td></td>
<td>• The weather.</td>
</tr>
<tr>
<td></td>
<td>• Transport problems.</td>
</tr>
<tr>
<td></td>
<td>• Terrorist activity.</td>
</tr>
<tr>
<td></td>
<td>• Season/craze/fashion.</td>
</tr>
</tbody>
</table>

| Dress codes | Black tie. |
|            | Business attire. |
|            | Cocktail attire. |
|            | Casual attire. |
|            | White tie. |
|            | Other. |

| Location | Where. Make sure the venue chosen is adequate for the proposed event. Do not forget to consider the impact on the local community, how easy it will be for people to get to the venue and any car parking requirements. Consider the suitability of the venue and any existing hazards, which may be on the site such as water hazards, overhead power lines etc. Consider whether emergency routes will be adequate. |

| Venue Type | Marquee. |
|           | Tent. |
|           | Fixed venue. |

| Proposed Sponsors | Identify sponsors who will be involved in the event. Who will manage the sponsors? What is the sponsorship agreement? What does include? Branding opportunities? Etc. |

| Brand | Insert 3 brand words that describe/philosophise brand. This relates to Character Diamonds – covered in the previous section. |

| Brand Experience | Insert the brand experiences that the client requires for the event. |

| Procurement Process | What is the procurement process that the event organiser needs to follow? |

**Table 1: The Client Interview Continued**
Stakeholders would include people benefiting from a successful event and who would play a role in facilitating the event. The list could include:
- Management, employees and project teams within the company,
- Representatives from the community,
- Businesses such as vendors and suppliers,
- Entertainers, such as celebrities and local leaders,
- Media representatives.

Stakeholders usually determine whether the event is good or bad. Therefore, it becomes necessary for the event organiser to understand dynamics and roles of different stakeholders within a particular event.

Here are a few standard tips might help in this process:
- Understand the stakeholders. Every event has specific stakeholders and although the categories might be similar, groups vary significantly. (Refer to the table below for different event types and relative stakeholders).
- Understand stakeholders' drives. Why this particular group of people is involved in the event? What are their needs? What do they expect from the event?
- Priorise stakeholders. Which needs are most critical to the achievement of the event objectives? It is usually a good practice to organise the stakeholders hierarchically by influence on the event and benefit sought. Bearing in mind such needs during the event will surely help in reminding what is important to achieve.
- Understand the power of community. Communities are both participants and judges of an event. Understanding their power and respecting their environment could become an exceptional promotion for your next event.

Before meeting objectives can be established, the stakeholders of a meeting or event must be identified and their needs, desires and challenges established through a needs assessment process. Stakeholders are all the individuals who are invested in a project or event such as the sponsors, attendees, vendors, media and others.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Awards Dinner.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gala Dinner.</td>
</tr>
<tr>
<td></td>
<td>Golf Day.</td>
</tr>
<tr>
<td></td>
<td>Launch.</td>
</tr>
<tr>
<td></td>
<td>Learning Program.</td>
</tr>
<tr>
<td></td>
<td>Meeting and Incentive.</td>
</tr>
<tr>
<td></td>
<td>Sales.</td>
</tr>
<tr>
<td></td>
<td>Shareholder.</td>
</tr>
<tr>
<td></td>
<td>Special Event.</td>
</tr>
<tr>
<td></td>
<td>Teambuilding Event.</td>
</tr>
<tr>
<td></td>
<td>Trade Show.</td>
</tr>
<tr>
<td></td>
<td>Year End Function.</td>
</tr>
<tr>
<td></td>
<td>Other.</td>
</tr>
</tbody>
</table>

**Table 1: The Client Interview Continued**
| Purpose | Define what the purpose is for the event using this list:  
| Cause related/Fundraising.  
| Celebration.  
| Competition.  
| Decision making.  
| Education/Learning.  
| Entertainment.  
| Government.  
| Idea exchange.  
| Image enhancement. | Incentive/reward.  
| Policy development.  
| Promotion.  
| Problem resolution.  
| Product introduction.  
| Recognition.  
| Revenue generation.  
| Teambuilding.  
| Tourism.  
| Other. |

| Objective | Objectives will affect how the organiser plans and sets up the event. If planning a client appreciation event where attendees at a conference may have several choices on the same evening, the objective would be to create something that will pique their interest and get them to the event. It is critical to discuss what the purpose is for the event. Give the client a list and ask him/her to choose which ones are applicable. Also outline what the specific objectives are for the event. Most of the time the client will have a pretty good idea of what they want to achieve so it will just be a case of mining the information.  
| Objectives Include:  
| Attendance.  
| Contribution.  
| Fun and Engagement.  
| Guest Satisfaction.  
| Image Perception.  
| Learning Outcomes.  
| Membership.  
| Participation.  
| Publicity.  
| ROI.  
| Sales.  
| Sponsorship. | Product launches.  
| Support a fund-raising endeavor that the company advocated.  
| Public awareness.  
| Brand – name recognition.  
| Milestones.  
| Bring a wide range of people together to exchange information and ideas.  
| Sales recognition.  
| Opportunity to bring staff, sales, suppliers, clients and dealers together.  
| Create one-of-a-kind events to recognise increase in sales.  
| Enlist the support of family and partners.  
| Media attention.  
| Public awareness.  
| Attracting new clients.  
| Product launches.  
| Award presentations.  
| Recognition of outstanding performance (either internally or by external participants in the industry).  
| Honouring a person or an achievement.  
| Celebrating a successful year.  
| Celebrating years of service (by individuals or the company).  
| Meeting potential customers.  
| Thanking existing customers.  
| Communicating the corporate message.  
| Teambuilding exercise.  
| Rewarding of individuals or teams or the entire staff for success attained.  
| Commemorating important anniversaries.  
| Paying tribute to exemplary individuals.  
| Acknowledging the role of existing clients. |

**Table 1: The Client Interview Continued**
| Cost Management | Budget.  
| Excludes.  
| Vat inclusive.  
| Payment process.  
| Per head cost.  |
| Time Frame | Total Project Time Line:  
| Step 3: Proposal Due Date.  
| Step 4: Confirmation Stage Gate.  
| Step 6: Approval Stage Gate.  
| Step 8: The Event.  
| Set up.  
| Breakdown.  
| Step 9: Closure.  |
| Acquisition Process.  
| Support Personnel:  
| Committees.  
| Staff.  
| Students/Interns.  
| Sponsors/Co-Sponsors.  
| Temporary Staff.  
| Volunteers.  
| Duration Personnel Required.  
| No.  
| Other.  |
| Attendee Management | Attendance Mandatory.  
| Group Personality:  
| Adventure.  
| Adult – Oriented.  
| Competitive.  
| Family – Oriented.  
| Fun/Interactive.  
| Luxury/Opulence.  
| Mature/Conservative.  
| Participatory/Active.  
| Rugged/Outdoors.  
| Sophisticated.  
| Spectator/Passive.  
| Serious.  
| Audience Profile:  
| The information you have on the audience members the better. These can include audience profile, gender, age, demographic information, whether they are bringing a spouse, income level, educational background, group personality and special needs. You should also base information on what audience members had to say about the past event as well as whether there expectations were met.  
| Who. Identify the aims of the event. Are particular groups or types of people to be targeted, such as young children, teenagers, the elderly or disabled?  
| If so, specific facilities may be required to accommodate them or additional stewards to ensure adequate safety standards are maintained. Set a realistic maximum number who can attend. If it is appropriate, print numbered tickets to be sold or distributed through named contacts.  
| Male/Female Ratio.  
| Age Range.  
| Attendance.  
| Children’s Ages.  
| Position/Profession of Guests.  
| Income Level.  
| Educational Background.  
| Where are Attendees Coming From.  
| Previous Attendance.  
| Cultural Background.  
| Cultural Restrictions.  
| Attendee Expectations:  
| "What has been done before? What did they like? What did they not like? How do you want attendees to feel after event? What do you want them to think? Why must they attend this event?"  |

Table 1: The Client Interview Continued
<table>
<thead>
<tr>
<th>Invitation and Registration</th>
<th>Managed By.</th>
<th>Registration Process:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation Medium:</td>
<td>HTML invitation.</td>
<td>@ Door.</td>
</tr>
<tr>
<td></td>
<td>HTML with RSVP automation.</td>
<td>SMS.</td>
</tr>
<tr>
<td></td>
<td>Physical invitation.</td>
<td>Online system.</td>
</tr>
<tr>
<td></td>
<td>Open to public</td>
<td>Website.</td>
</tr>
<tr>
<td>Invitation Process:</td>
<td>Save the date.</td>
<td>Facebook.</td>
</tr>
<tr>
<td></td>
<td>Invite.</td>
<td>Computicket.</td>
</tr>
<tr>
<td></td>
<td>Confirmation notification.</td>
<td>By Invite Only.</td>
</tr>
<tr>
<td></td>
<td>Barcoded ticket confirmation.</td>
<td>Onsite Printing:</td>
</tr>
<tr>
<td></td>
<td>Follow up phone call.</td>
<td>Accreditation for vendors.</td>
</tr>
<tr>
<td></td>
<td>Reminder sms 1 day before event.</td>
<td>Certificates.</td>
</tr>
<tr>
<td></td>
<td>All of the above.</td>
<td>Desk tents.</td>
</tr>
<tr>
<td></td>
<td>If no show — call.</td>
<td>Name Tags.</td>
</tr>
<tr>
<td></td>
<td>Other.</td>
<td>Registers.</td>
</tr>
<tr>
<td>Invittee List:</td>
<td>Yes database exists.</td>
<td>Registration Personnel Required:</td>
</tr>
<tr>
<td></td>
<td>No database.</td>
<td>Registration kiosks.</td>
</tr>
<tr>
<td></td>
<td>Yes database but requires maintenance.</td>
<td>High chairs.</td>
</tr>
<tr>
<td>Invitation Date:</td>
<td>Reg. System:</td>
<td>Stanchions.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Credenza.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Trestle tables.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Conference chairs.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Amenities</th>
<th>Gifts Required.</th>
<th>Gift Supplier.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Sweets.</td>
<td>Gift Number.</td>
</tr>
<tr>
<td></td>
<td>Table amenities.</td>
<td>Packaging.</td>
</tr>
<tr>
<td></td>
<td>Substantial.</td>
<td>Printed Message.</td>
</tr>
<tr>
<td></td>
<td>Meeting pack.</td>
<td>Colours.</td>
</tr>
<tr>
<td></td>
<td>Executive.</td>
<td>Personnel.</td>
</tr>
<tr>
<td></td>
<td>Gimmick.</td>
<td>Time.</td>
</tr>
<tr>
<td>Given To:</td>
<td>Customers.</td>
<td>Prizes.</td>
</tr>
<tr>
<td></td>
<td>Vendors.</td>
<td>Awards.</td>
</tr>
<tr>
<td></td>
<td>Exhibitors.</td>
<td>Logo Merchandise.</td>
</tr>
<tr>
<td></td>
<td>Venue.</td>
<td>Programs.</td>
</tr>
<tr>
<td></td>
<td>Speakers.</td>
<td>Collateral Materials.</td>
</tr>
<tr>
<td></td>
<td>VIPS.</td>
<td>Conference Materials.</td>
</tr>
<tr>
<td></td>
<td>Event organiser.</td>
<td>Register.</td>
</tr>
<tr>
<td></td>
<td>Event personnel.</td>
<td>Printed Menus.</td>
</tr>
<tr>
<td></td>
<td>Combination.</td>
<td>Name Placements.</td>
</tr>
<tr>
<td>Location: Where will gifts be handed out?</td>
<td>Registration.</td>
<td>Reserved Seat Place Card.</td>
</tr>
<tr>
<td></td>
<td>Table.</td>
<td>Reserved VIP Place Card.</td>
</tr>
<tr>
<td></td>
<td>Exhibition.</td>
<td>Other.</td>
</tr>
<tr>
<td></td>
<td>Other.</td>
<td></td>
</tr>
</tbody>
</table>

*Table 1: The Client Interview Continued*
| Seating Requirements | Seating Management  
Pre – assigned seating.  
Free seating.  
Reserved VIP seating.  
Pre – assigned seating chart.  
Pre – assigned table chart.  
Allocated by ticket.  
No. Reserved Seats.  
Ushers.  
Award Hostess. |
|----------------------|--------------------------------------------------|
| Site Requirements    | Type,  
Size.  
Breakaways.  
Special Requirements.  
Accommodation.  
Activities.  
Venue Set Up:  
Banqueting rounds.  
School room.  
Cinema.  
Royal tables.  
Customised.  
Theatre.  
Other. |
| Dance Floor.  
Storage Required.  
Event Office Required.  
Speaker Rehearsal Room.  
Other. |
| Housing Requirements | Name of Hotel.  
No. of Rooms.  
Types of Occupancy:  
Single.  
Family.  
Sharing.  
Reservation Method:  
Block/group booking.  
Self-booking.  
Agency booking.  
Arrival Date.  
Departure Date.  
Special Needs. |
| Amenities.  
Incidentals.  
Billing Instructions:  
Room to master account.  
Incidentals to master account.  
Room to guest account.  
Incidentals to guest account.  
Room to master account, incidentals to guest account.  
Room and incidentals to master account.  
Room and incidentals to guest account.  
Room Drops.  
Room Restrictions. |
| Travel and Transport Requirements | Flights:  
National flights.  
International flights.  
Regional flights.  
National, international, regional flights.  
From.  
Flight Class:  
First Class.  
Economy Class.  
First and Economy Class. |
| To.  
Transport.  
Transport Types:  
Rental car.  
Coaches.  
Self-drive.  
Date.  
Supplier. |

Table 1: The Client Interview Continued
<table>
<thead>
<tr>
<th>Design Requirements</th>
<th>CONCEPT/THEME</th>
<th>ENTERTAINMENT REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concept.</td>
<td></td>
<td>Activity:</td>
</tr>
<tr>
<td>Theme.</td>
<td></td>
<td>Background music.</td>
</tr>
<tr>
<td>Message.</td>
<td></td>
<td>Ceremony.</td>
</tr>
<tr>
<td>Tone.</td>
<td></td>
<td>Comedian.</td>
</tr>
<tr>
<td>Costumes.</td>
<td></td>
<td>Dancers.</td>
</tr>
<tr>
<td>Hook.</td>
<td></td>
<td>DJ.</td>
</tr>
<tr>
<td>CATERING REQUIREMENTS</td>
<td></td>
<td>Exhibits.</td>
</tr>
<tr>
<td>Food Required</td>
<td></td>
<td>Games.</td>
</tr>
<tr>
<td>Beverages Required.</td>
<td></td>
<td>Headliner act.</td>
</tr>
<tr>
<td>Type Food:</td>
<td></td>
<td>Instrumental band.</td>
</tr>
<tr>
<td>Breakfast.</td>
<td></td>
<td>Interactive.</td>
</tr>
<tr>
<td>Lunch.</td>
<td></td>
<td>Live music.</td>
</tr>
<tr>
<td>Dinner.</td>
<td></td>
<td>Magician.</td>
</tr>
<tr>
<td>Snacks.</td>
<td></td>
<td>Multimedia production.</td>
</tr>
<tr>
<td>Type Beverages:</td>
<td></td>
<td>Singing band.</td>
</tr>
<tr>
<td>Alcoholic.</td>
<td></td>
<td>Solo artist.</td>
</tr>
<tr>
<td>Non-alcoholic.</td>
<td></td>
<td>Speaker.</td>
</tr>
<tr>
<td>Alcoholic and non-alcoholic.</td>
<td></td>
<td>Specialty act.</td>
</tr>
<tr>
<td>Service Style:</td>
<td></td>
<td>Theatrical Production Previously Used:</td>
</tr>
<tr>
<td>Action stations.</td>
<td></td>
<td>Wish List.</td>
</tr>
<tr>
<td>Buffet.</td>
<td></td>
<td>Master of Ceremonies.</td>
</tr>
<tr>
<td>Combination.</td>
<td></td>
<td>Audio Visual Requirements</td>
</tr>
<tr>
<td>Finger food.</td>
<td></td>
<td>* Essential items e.g.</td>
</tr>
<tr>
<td>Family style.</td>
<td></td>
<td>stage/lighting/screens not included here as they are standard required items.</td>
</tr>
<tr>
<td>Platters.</td>
<td></td>
<td>Laptops.</td>
</tr>
<tr>
<td>Plated.</td>
<td></td>
<td>Sound for Laptops.</td>
</tr>
<tr>
<td>Silver service.</td>
<td></td>
<td>Comfort Monitors.</td>
</tr>
<tr>
<td>Service Style:</td>
<td></td>
<td>Power Plugs on Stage.</td>
</tr>
<tr>
<td>Waiter service.</td>
<td></td>
<td>Data Projector.</td>
</tr>
<tr>
<td>Bar service.</td>
<td></td>
<td>Podium.</td>
</tr>
<tr>
<td>Waiter and bar service.</td>
<td></td>
<td>Multimedia Pointer.</td>
</tr>
<tr>
<td>Self-service.</td>
<td></td>
<td>Flip Chart.</td>
</tr>
<tr>
<td>Special Requirements:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Halal.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kosher.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vegetarian.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dietary.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brands:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>International.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local and International.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top shelf.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome Beverages.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costing:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Token/ticket system.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local beer and wine.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full bar paid by client.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited bar paid by client.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set limit bar.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome Food.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Courses.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Starters, Main, Dessert.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hors d'oeuvres/Appetisers/Starters/Main/Dessert.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printed Menus.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottled water.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water station.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jugs of water.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialty jugs of water.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottled sparkling and still water.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Table Wines.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restrictions.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Table 1: The Client Interview Continued*
After interviewing the client the event organiser must process all the information gathered. When it comes time to research, keep all the notes close by for reference. The organiser will find many ways to get information from the client. Some information will come in the form of outright requests while other information will be harder to decipher. Placing a value on all the information, no matter how small, will catapult the organiser into the next level of event planning.

Once all the information about what the event has been received focus on the purpose of the event and the goals and objectives.

**SPECIFYING THE EVENT GOALS AND OBJECTIVES**

**EVENT AIMS AND OBJECTIVES**

The event aims are broken down into specific objectives – the steps required to achieve each aim.

Objectives should be ‘SMART’:

- **Specific** to the event.
- **Measurable** quantitatively.
- **Agreed** (or achievable) by those involved.
- **Realistic** (or relevant) to the resources available.
- **Timed** around the event schedule.

SMART objectives help identify performance targets for the event which facilitate the later evaluation of the event e.g. by specifying volumes of income or profit, ticket sales, advertising revenue, sponsorship, donations, number of international visitors etc.

**WHAT’S THE GOAL?**

For an event to have impact the event organiser must first determine its goals. Those goals should be clear, precise, tied in some way to the company’s objectives, and measurable. Just because it sound like a good idea to have a conference isn’t enough to commit resources into it.
Aims and objectives are crucial and must be resolved early as they impact on many aspects of the event, including marketing and sponsorship. These are linked closely to the purpose of the event. Always ask the question “What is the specific reason for having this event?”

IDENTIFYING THE EVENT GOALS AND OBJECTIVES

Goals and objectives are crucial. They must be defined and measurable.

The acronym SMART, devised by George Doran for an article on writing management goals and objectives for Management Review in 1981, illustrates the qualities of goal and objective statements.

Specific: Must be specific in targeting the objective.
Measurable: Must have a measurable indicator of progress and success.
Assignable: Must be capable of being assigned to someone to accomplish.
Realistic: Must be realistic within allotted resources (time, money and human resources).
Time – related: Must have a specified duration.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Project Management Process</th>
<th>Event Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Time Management</td>
<td>Schedules</td>
</tr>
<tr>
<td>Money</td>
<td>Financial Management</td>
<td>Budget</td>
</tr>
<tr>
<td>Human power</td>
<td>Human Resources Management</td>
<td>Organisational Chart</td>
</tr>
<tr>
<td>Information</td>
<td>Communications Management</td>
<td>Production Book</td>
</tr>
<tr>
<td>Space</td>
<td>Site Management</td>
<td>Site Plan</td>
</tr>
<tr>
<td>Supplies</td>
<td>Procurement Management</td>
<td>Requests for Proposal and Bid</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Specifications</td>
</tr>
</tbody>
</table>

Controlling Resources through Event Project Management

Overall Goal: The overall goal highlights the higher level objective(s) to which the project is expected to contribute to.

Project Purpose: The project purpose describes the intended impact or the anticipated benefits as a precisely stated future condition the project is expected to achieve and only contributes to the overall goal. The longer term purpose of the project linked to the business.

Phillips created six levels of measurement, as part of an ROI methodology, which can be a useful framework when creating meeting objectives. Only 5 – 10% of an organisation’s meetings should have level 5: ROI objectives; yet all meetings should have level 0: Statistics, Scope, and Volume objectives established. Only those meetings which support the organisation’s strategic objectives and/or incur significant cost/time for the staff and/or attendees should be taken to level 4: Business Impact or level 5: ROI.

- **Level 0 – Statistics, Scope and Volume:** Objectives as this level address meeting statistics as well as the scope and volume of meeting attendance, press coverage, budgetary measures, and so on.
- **Level 1: Reaction, Satisfaction, and Planned Action:** These objectives address the desired reaction and satisfaction levels of stakeholders to meeting elements, components, content, speakers, and so on.

- **Level 2: Learning:** These objectives address what the attendees will learn or acquire at the meeting in the form of knowledge, skills, attitudes, opinions, and professional contacts.

- **Level 3: Application:** These objectives address what the attendees will do with the knowledge, skills, attitudes, opinions, and professional contacts acquired back in their workplace or lives.

- **Level 4: Business Impacts:** These objectives address what personal, professional or business impact the meeting will have on the attendee, meeting host, sponsor etc.

- **Level 5: ROI:** These objectives address what the return on investment will be for the meeting host, attendees etc. The ROI is calculated using the meeting benefits and costs and can be expressed as the benefit/cost ratio (BCR) or an ROI percentage.

---

**THE SIX MEETING OBJECTIVES**

**LEVEL 0 – STATISTICS, SCOPE AND VOLUME:**

Objectives as this level address meeting statistics as well as the scope and volume of meeting attendance, press coverage, budgetary measures, and so on.

**Good Level 0 Objectives:**
- Identify statistics that are important to the meeting organizer and/or key stakeholders.
- Name statistics or key indicators that are measurable and easily collected following a meeting.
- Are clearly worded, attainable, and specific to the meeting.
- For example: Attain 100 paid attendees at a rate of R6500 per attendee or generate R200, 000 net profit from the sales conference.

**LEVEL 1 – REACTION, SATISFACTION, AND PLANNED ACTION:**
These objectives address the desired reaction and satisfaction levels of stakeholders to meeting elements, components, content, speakers, and so on.

**Good Level 1 Objectives:**

- Identify issues that are measurable and important to the meeting organiser and/or key stakeholders.
- Are attitude – based, clearly worded, and specific.
- For example: 70% of attendees would recommend the workshop to others or participants will rate the meeting as good investment for the company with an average of 4.3 out of 5.0.

**LEVEL 2 – LEARNING:**

These objectives address what the attendees will learn or acquire at the meeting in the form of knowledge, skills, attitudes, opinions, and professional contacts.

**Good Level 2 Objectives:**

- Begin with an action verb and avoid using verbs that are vague and immeasurable. For example know, understand, appreciate, comprehend, learn and enjoy.
- Describe behaviours that are observable, measurable, realistic, and attainable.
- Are outcome – based.
- Specify what the attendee must do as a result of the meeting or individual session within the meeting.
- They are focused on performance – identifying what the meeting attendee will be able to do at the end of the meeting or event. They also indicate the circumstance under which the attendee will perform the task or behaviour and lastly, specify the degree or level of proficiency that is necessary to perform the task or behaviour.
- Examples: Successfully demonstrate negotiation techniques during workshop role play or score 75 out of 100 on new sales strategy quiz given at end of meeting.

**LEVEL 3 – APPLICATION:**

These objectives address what the attendees will do with the knowledge, skills, attitudes, opinions, and professional contacts acquired back in their workplace or lives.

**Good Level 3 Objectives:**

- Identify behaviours that are observable and measurable.
- Are outcome – based, clearly worded, and specific.
- Specify what the meeting participant will change or do as a result of the meeting.
- For example: Achieve 75% of action plan within 3 months of the meeting or Ten percent of attendees will submit a request for proposal (RFP) to lead sponsor within 3 months of the conference.
LEVEL 4 – BUSINESS IMPACTS:

These objectives address what personal, professional or business impact the meeting will have on the attendee, meeting host, sponsor etc.

**Good Level 4 Objectives:**

- Contain measures that are linked to the skills and knowledge taught as well as professional contacts acquired or strengthened at the meeting.
- Describe measures that are easily collected.
- Specify a business measure that the attendee has accomplished in their job, or personal life. Examples of business measures are time savings, greater productivity, reduced costs, and increased customer satisfaction.
- Examples: Attain 20 new association members within 9 months of the meeting or Save 1 or more hours a week on routine administrative tasks within 3 months of the meeting.

LEVEL 5 – ROI:

These objectives address what the return on investment will be for the meeting host, attendees etc. The ROI is calculated using the meeting benefits and costs and can be expressed as the benefit/cost ratio (BCR) or an ROI percentage.

**Examples of Level 5 Objectives:**

- Achieve a 25% return on investment within 12 months of the meeting.
- Attain a 2:1 BCR on the meeting within 12 months (meaning for each Rand spent on the meeting or event, R2 was returned as benefits).

How to Calculate Value/Return on Events

According to Event Marketing Institute: “Events that get measured are 58% more likely to get budget increases, than events that don’t get measured.”

It’s no longer something that is nice to have - it’s critical to the future of events. The good news is that events/experiences can be measured.

**IN PRACTICE**

*Table 2: Example of Event/ Meeting Objectives*
<table>
<thead>
<tr>
<th>EVENT</th>
<th>GOAL</th>
<th>OBJECTIVE</th>
<th>MEASUREMENT</th>
</tr>
</thead>
</table>
| Social Media Conference | Generate profit. Educate attendees on social media. Promote future courses. Networking opportunity. | Level 0: Statistics, Scope and Volume
Attain 50 said attendees at rate of R2950.
Generate R50,000 net profit.
10% of attendees to book for future training within 6 months. |
|                   | Level 1: Reaction and Satisfaction                                     | 85% of attendees will recommend the company to colleagues.                 | Survey      |
|                   | Level 2: Learning                                                       | 50% of attendees to rate the venue as a convenient location.              | Survey      |
|                   | Level 3: Application/Behaviour                                          | Demonstrate an understanding of social media by completing a Twitter and Facebook exercise at the event. |
|                   | Level 4: Impact                                                        | Complete a questionnaire 1 month after the event identifying usage of social media. |
|                   | Level 5: ROI                                                          | Attendees use the event for networking.                                   | Survey      |
|                   |                                                                      | 50% of attendees to create a business Facebook page within 1 month of attending this event. | Survey      |
|                   |                                                                      | 50% of attendees will be able to manage their own social media campaigns saving 30% on consultant’s costs. | Survey      |
|                   |                                                                      | Increase ROI by 1.47 or 147%.                                             | Value’ investment R2950 X 50 = R147,500 Investment R100,000 – 1.47 or 147% ROI. |
| **Annual Association Dinner** | Sell tables.  
Securing sponsors.  
Attain new members.  
Retain existing members. | **Level 0 – Statistics, Scope, Volume/Target Audience** | Get people to book and attend before 1 October 2015.  
Generate R1 mil from sponsors.  
Obtain 5 prospective meeting sponsors who generate R500,000 in revenue for 2014. | Total attendance.  
Revenue.  
New client leads/sales. | **Response from audience via surveys.** |
| **Product Launch** | Introduce new product.  
Disseminate information.  
Learn about how product works. | **Level 0 – Statistics, Scope, Volume/Target Audience** | Get 100 people to book and attend the event.  
Get 10 key media role players to attend event.  
Get 3 key articles in industry publications.  
Increase sales by 5% within 3 months. | Total attendance.  
Media coverage.  
Sales growth. | **Response from audience.  
New client lead.  
Survey results.  
Quality of attendance.  
Response from management.  
Survey results.  
Relationship learning (networking).** |

| **Level 1 – Reaction and Satisfaction** | 80% of guests after the dinner would recommend the association to others.  
Attendees will rate venue experience and F and B an average of 4.3 out of 5.0. | **Level 2 – Learning** | 80% of guests to demonstrate understanding of the product. |

| **Level 5 – ROI** | Achieve a 200% return on investment of 2.0. | **R1 mil sponsorship R500,000 costs/investment.** |

| **SUMMARY** |

The rationale for creating goals and objectives for meeting and events was presented using the Phillips model. Objectives are essential to a successful meeting or event. These meeting objectives provide direction and guidance to staff, planning committees, speakers, suppliers, and other consultants who will create, market, implement, and evaluate the meeting or event. Prior to the development of the event objectives, a needs assessment is conducted to collect and analyse information. This occurs when the client is interviewed using The Client Interview Form.

A six-level measurement framework can be used to create meeting objectives for key stakeholders. The most basic objectives indicate the scope, volume, and statistics of meeting attendance and budgetary measures. The highest level objectives address the ROI for meeting/event stakeholders.
Step Two

Research and Development Phase
COVERED IN THIS SECTION:

INTRODUCTION
FEASIBILITY STUDIES
SWOT ANALYSIS
RESEARCH TECHNIQUES
DEVELOPING THE EVENT CONCEPT
  Overview
  Designing the Experience
  Concept Development
  Introduction to Themes and Concepts
  The Purpose of Themes
  Theme and Concept Development: Where to Start?
  Principles of Developing Themes
  Theme Elements
  Steps to Developing Themes and Concepts

DEVELOPING THE EVENT STRATEGY
  Selecting and Soliciting Vendors, Venues and Speakers
  Selecting and contracting Caterers
  Selecting and Contracting Entertainers
  Venue/Site Selection Process
  Finding and Securing Speakers
INTRODUCTION

This section is divided into a) Research and b) Development.

**Research:** Refers to the research the event/scope and the concept.
**Development:** Refers to the development of the event plan and the concept.

In research and development both the event and the concept need to be researched and developed fully.

The event organiser must put together an overall picture of the final event and the concept, to be able to incorporate all the necessary elements and components, as well as merge the logistical and operational parameters and practices into the event plan.

Some organisers prefer to start with the concept, developing the theme or event name, in a manner similar to composing the title of a book. Then they start filling in all the details, like roots growing from the base of a tree. Research may be conducted throughout the development. If the client has a predetermined and confirmed concept and theme then the event organiser would not have to develop a concept and theme but would merely have to research it and develop it further, followed by developing an event plan.

Others begin with research the event elements, building a pyramid with all the details until the complete picture or vision of the event emerges. It is critical to realise that the entire event must be envisioned and implemented in your head, and on paper, before the next step is taken.

If the client has no predetermined concept or theme, the event organiser would need to develop and conceptualise a concept and theme from scratch. If this is the case the event organiser would start by researching ideas, brainstorming ideas, seeing what is possible etc. They would then move onto developing the concept followed by then developing the event.

In both instances research is generally the starting point when developing an event plan, followed by the development of the concept and theme, ending with the development of the event plan.

---

*Figure 9: Research and Development Process*
Excellent event research and development reduces risk. The better research you conduct prior to the event, the more likely you are to produce an event that matches the planned outcomes of the organisers and stakeholders.

**RESEARCH AND DEVELOPMENT DEFINED**

*Event research* can be defined as the systematic activity combining both basic and applied research, and aimed at discovering solutions to problems or creating new goods and knowledge. Excellent event research which pinpoints the needs, wants, desires, and expectations of stakeholders and participants reduces risk. Conduct the necessary research to determine expectations and create a customer profile of the event attendees or participants.

- Begin by determining whether there is a demand for the event.
- Information can be gathered through surveys, interviews and focus groups.
- Research can also mean interviewing suppliers or talking to planners who have produced similar events.
- Above all, research should include extensive questioning of the client about their expectations for the event. The Client Interview Form assists in gathering a lot of the necessary information needed to build a comprehensive event plan.

*During the development stage*, an entire event blueprint plan needs to be mapped out. The development phase is complete when implementation is ready to start. All matters must be clear for the parties that will carry out the implementation. *[Refer to chapter 7 – Event Strategy]*.

In some projects, particularly smaller ones, a formal development phase is probably not necessary. The important point is that it must be clear what must be done in the implementation phase, by whom and when. Before investing a lot of time and money into an event, it is important to research the concept to evaluate the likelihood of its success. This can be done by investigating other similar events that have been held locally or in another location. Consider any available market research about these events in terms of audience participation and community acceptance. Through the process of researching, the event organiser will be able to establish the viability of the event for an audience.

**FEASIBILITY STUDIES**

**IS IT FEASIBLE?**

*Feasibility* simply means that looking at the event objectively to determine if what has been proposed is feasible given the resources available. This is the final checkpoint before actual planning begins, and therefore, must be given adequate time for review. The three basic resources that will be required are financial, human, and time. Each of these resources may have varying degrees of importance, depending on the nature of the event. Feasibility studies are based on determining if the event is *viable, desirable, and suitable*. It is the final checkpoint for the event design before proceeding to begin the stages of event planning.
• **Financial Considerations:** Check if sufficient financial resources are available to sustain development and implementation of the event. Consider what will happen if the event loses money. How will creditors be paid? What resources are available for an immediate infusion of cash should the event require this to continue development.

• **The Human Dimension:** In assessing the feasibility of an event, consider where the human resources will come from and how they will be rewarded. How will they work together as an efficient event team?

• **Time Considerations:** Considered whether there is enough time to develop, plan and implement the event in the time given.

Once these points are addressed, the event research and design are added to the event history and official approval is required to move forward. A feasibility study will result in a conclusion as to whether to proceed with the event or to cease. If the event is feasible the next step would be to complete a SWOT Analysis.

### SWOT ANALYSIS

**A SWOT analysis** must be completed before the event organiser begins planning the event. The SWOT analysis assists in identifying the internal and external variables that may prevent the event from achieving maximum success.

**SWOT stands for:**

'S' stands for Strengths.

'W' stands for Weaknesses.

'O' stands for Opportunities.

'T' stands for Threats.

It is a strategic planning tool which is used to identify and analyze the strengths, weaknesses, opportunities and threats involved in your project. A SWOT analysis can also be done on the organisation. It is very important to conduct a SWOT analysis before developing an event plan. It assists in developing a strategy which maximises the potential of strengths and opportunities of your project and at the same time, minimises the impact of the weaknesses and threats.

**ANALYSIS REPORT**

After conducting market, competitors, product/service research and SWOT analysis, create a report which contain details of all the research work completed. Documentation of the research work is important for the event evaluation. The analysis report will also help in getting sponsorship for the event.

**CARRYING OUT A SWOT ANALYSIS**

To carry out a SWOT analysis effectively, it's a good idea to get a team together, drawn from across the business, for a brain-storming session. Consider each of the four SWOT areas in turn, and make note of all the ideas, suggestions and comments which are made. These can be reviewed and edited after the brain-storming session.
BRAIN-STORMING SESSION

A good method to use is to take a large sheet of paper, or a whiteboard, and split it into four sections, as demonstrated in the following table.

Now fill in the four sections with ideas. See below for guidance:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengths are those features of the business which allow you to operate more effectively than your competitors. For example, a strength could be your specialist technical knowledge. You need to consider your strengths from your own point of view and from that of your customers' and clients'. You must be realistic and honest.</td>
<td>Weaknesses are areas capable of improvement. Are you lacking skills or new products? Do you have a higher cost base or lower productivity than your competitors? You must face any unpleasant truths about your business and be realistic.</td>
</tr>
<tr>
<td>These are the attributes of your project/organisation which are helpful in achieving project's objectives. For e.g.: experienced event team, high motivation level, excellent PR, good market share etc.</td>
<td>Try answering the following questions:</td>
</tr>
<tr>
<td>Try answering the following questions:</td>
<td>Can you do anything better?</td>
</tr>
<tr>
<td>What is that you do well?</td>
<td>Do you do anything badly?</td>
</tr>
<tr>
<td>What advantages do you have over your competitors?</td>
<td>What should be avoided?</td>
</tr>
<tr>
<td>What makes you different from your competitors?</td>
<td>What causes problems or complaints?</td>
</tr>
<tr>
<td><strong>Other Strength Categories:</strong></td>
<td><strong>Other Weaknesses Categories:</strong></td>
</tr>
<tr>
<td>Accreditation.</td>
<td>Accreditation.</td>
</tr>
<tr>
<td>Communication.</td>
<td>Communication.</td>
</tr>
<tr>
<td>Cultural behaviour and attitudes.</td>
<td>Cultural behaviour and attitudes.</td>
</tr>
<tr>
<td>Competitive advantages.</td>
<td>Competitive advantages.</td>
</tr>
<tr>
<td>Experience.</td>
<td>Experience.</td>
</tr>
<tr>
<td>Innovation.</td>
<td>Innovation.</td>
</tr>
<tr>
<td>Location.</td>
<td>Location.</td>
</tr>
<tr>
<td>Marketing.</td>
<td>Marketing.</td>
</tr>
<tr>
<td>Management.</td>
<td>Management.</td>
</tr>
<tr>
<td>Processes.</td>
<td>Processes.</td>
</tr>
<tr>
<td>Product.</td>
<td>Product.</td>
</tr>
<tr>
<td>Price.</td>
<td>Price.</td>
</tr>
<tr>
<td>Proposition.</td>
<td>Proposition.</td>
</tr>
<tr>
<td>Resources.</td>
<td>Resources.</td>
</tr>
<tr>
<td>Reputation.</td>
<td>Reputation.</td>
</tr>
<tr>
<td>USP.</td>
<td>USP.</td>
</tr>
</tbody>
</table>
Once the SWOT analysis is complete, it is essential that to make note of the following:
- **What must be addressed immediately?**
- **What can be handled now?**
- **What needs researching further?**
- **What needs to be planned for the future?**

Once these have been identified, create an action plan to ensure that something is done! Assign someone to each point and set deadlines. Review the results of your analysis regularly to determine if anything has changed and what has been achieved.

**Points to Remember**

Use a SWOT analysis as a guide, but remember that it can be very subjective. Be aware that two different people might come up with two very differing analyses.
RESEARCH TECHNIQUES

Excellent event research reduces risk. The better the research you conduct prior to the event, the more likely the event organiser is to produce an event that matches the planned outcomes of the organisers or stakeholders.

Three types of research techniques that are used for pre – event research:

1. Quantitative.
2. Qualitative
3. Or a combination or hybrid of both.

Type chosen should be based on needs and feasibility, not convenience.

QUANTITATIVE PRE – EVENT RESEARCH

- Event leaders primarily use quantitative research to determine demographic information such as gender, age, income, and other pertinent facts about the future market for an event.
- This research is relatively inexpensive to conduct and is easy to tabulate and analyse with computers.
- Quantitative research is based on numbers and coding responses into a spreadsheet for statistical analysis
- Quantitative research includes experiments, surveys, and content analyses, and it answers the “Who, What, When, Where” questions.

QUALITATIVE PRE - EVENT RESEARCH

- Qualitative research explains meanings underlying the results of quantitative research and includes interviews, focus groups, observational studies, or case studies.
- It answers the “How” and “Why” questions.
- It tells the research organisations what is beneath the numbers in quantitative research and, therefore, is an important step in the research process. This type of research may take the form of a focus group, participant/observer research, or a case study. The focus group is typically comprised of 8 – 12 people of similar backgrounds and experience who assemble for the purpose of discussion. The group is audio taped and the tapes are later transcribed and analyzed to identify areas of agreement or discord.
## Pre – Event Research

<table>
<thead>
<tr>
<th>Qualitative Research</th>
<th>Quantitative Research</th>
<th>Mixed Research</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Classic Methods include:</strong></td>
<td><strong>Surveys</strong></td>
<td>Both quantitative and qualitative research is usually required to plan for successful events.</td>
</tr>
<tr>
<td>• Focus groups.</td>
<td><strong>Questionnaires</strong></td>
<td></td>
</tr>
<tr>
<td>• Individual depth interviews.</td>
<td><strong>Interviews</strong></td>
<td></td>
</tr>
<tr>
<td>• Photo ethnography.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Leading Edge Methods Include:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Online focus groups.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Online forums.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Online communities.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Focus Groups
- Usually 8 to 12 people of similar backgrounds and experiences gathered for the purpose of discussion and discovery.
- Led by trained facilitator who leads the group through specific questions and it may last 60, 90, or 120 minutes.
- Two-way mirrors are sometimes used to observe body language, facial expressions, and other gestures in response to questions.
- Video and audio tapes are also used to record sessions for later transcription and analysis.

### Observational Studies
- Ethnography (from Greek "ethnos" = folk/people and "grapho" = to write) is a qualitative research design and the resulting field study or case report reflects the knowledge and the system of meanings in the lives of a cultural group.
- Ethnography is a means to represent graphically and in writing, the culture of a people.

### Participant Observation
- Participant observation is a form of qualitative research wherein the researcher is placed within the host community, workplace, or event location to participate in and observe the culture.
- Interviews with stakeholders and participants are also essential to complete the observational study.

### Case Studies
A preexisting event is singled-out for intensive study from a historical perspective or through stakeholder interviews may be used to determine how personality, skill, and other factors drive the success of an event.

Event researcher draws conclusions from research on a comparable event.

### Innovators
Meeting Metrics (www.meetingmetrics.com) is an online system that incorporates a dashboard of tools including the discovery, pre-meeting, pulse, and post-meeting evaluation phases to

---

**Table 4: Pre – Event Research Methods**
DEVELOPING THE EVENT CONCEPT

DEVELOPING THE EVENT CONCEPT OVERVIEW

*Developing the event concept* is the next stage in the event management process. At this stage the concept is developed and researched.

The event organiser must, put together an overall picture of the final event, the concept, incorporate all the necessary elements and components, as well as merge the logistical and operational parameters and practices into the event plan. Some organisers prefer to start with the concept, developing the theme or event name, in a manner similar to composing the title of a book. Then they start filling in all the details, like roots growing from the base of a tree.

Others begin with the event elements, building a pyramid with all the details until the complete picture or vision of the event emerges. It is critical to realise that the entire event must be envisioned and implemented in your head, and on paper, before the next step is taken.

DESIGNING THE EXPERIENCE

Remember the event organiser is packaging and managing an experience. This means they must envision that experience, from start to finish, from the guest's point of view. They must imagine every minute of the guest’s experience.

Identify event elements and components that will enhance that experience. Identify elements that will build on previous successes, elements that will take advantage of opportunities and strengths, and elements that will mitigate challenges, weaknesses, and threats.
CONCEPT DEVELOPMENT

The event concept will help to establish a starting point for the process. As the event organiser proceeds through the process the concept should be modified and improved. The event concept is the abstract idea from which your theme will develop. It can be developed by considering the WHs and by using:

Diagram 1: Client Concept Core.
Diagram 2: Brainstorming Core.
Diagram 3: Theme/Concept ADMOR Core.
Diagram 4: Design Brainstorming Core.
Diagram 5: Marketing Brainstorming Core.
Diagram 6: Operations Brainstorming Core.
Diagram 7: Experience Brainstorming Core.
Diagram 8: Stakeholder Core.
Design Objectives: ROI and Word of Mouth Strategy.

DESIGN A “BIG PICTURE” CONCEPT OR THEME

It is always best to create a central concept or theme for an event during the early planning stages. This will help spawn innovative ideas with suppliers and create continuity throughout the event.
Listed below are a few key considerations for planning and designing an event with a central theme.

CREATING THE ENVIRONMENT

Creating the environment can be one of the most enjoyable tasks in staging an event. Use the venue floor plan as a foundation to design the event. Start with the “big picture” and plot out where the stage and dance floor will be, key décor elements, and interactive activities.

The event organiser should think of themselves as an attendee and “walk” through the floor plan. What is being seen, heard, and experienced? Be creative and do not be afraid to make mistakes. During this stage the event organiser will find that the event will quickly evolve into a “big picture” overview. From this point, drill down with more features and details.

As the design of the event evolves, the logistics become more prominent and integral to the management process. The success of any design requires a solid and detailed plan for its execution.

INTRODUCTION TO THEMES AND CONCEPTS

Concept: is an abstract/intangible idea.
Theme: Is the materialisation of that concept. It is the meaning behind the story. Central idea inferred by story. Themes establish expectations by putting experience in a recognizable context. They build excitement, create anticipation and promote involvement with experience to come.
Reinforce brand + message, marketing goal and/or desired behaviour.

*The theme, concept and event design* should be developed before the event organiser can start planning and executing the event. The event operations and logistics (planning) are all based on this. It is central to all planning and therefore has to be fully developed. The desire to create something remarkable for an event is usually the starting point. It brings together various creative disciplines into a continually new area of experience making every event a unique occasion. For the first time, event design and experience draws together the relationship between design and the experience of consumers and participants. It explores the event experience of the individual and how this can be ‘controlled’ by design.

There is a specific rhythm or flow that must be incorporated into event design and there is a reason behind every choice from food to program elements. Subtle tactical action is brought into play as well as strategic thinking. Mastering event design becomes an art form. Planners who apply strategic planning to the event design process have discovered a method that successfully works to elevate event planning to a new level. Strategic planning is one of the secret ingredients that lead to producing outstanding events that meet the expectations of both clients and guests.

Too often companies forsake the idea of a theme because it seems too difficult or unnecessary. A theme gives form to the organisation’s goals. A recognisable theme with correspondingly catchy graphics provides a visual representation. With each piece of literature or email being sent the organisation has an opportunity to put the recipient in the frame of mind to receive what is being said about the upcoming event.

Once the theme has been created, it should be consistently visible throughout all the printed and electronic materials. The theme gives the organisation a chance to reinforce their message with participants at every turn.

**THE PURPOSE OF THEMES**

All events have some sort of theme or concept embedded in them. The theme may be subtle or elaborate but essentially there will be a theme and a concept. Themes are important as they provide a face to the organisation’s brand.

Using a theme allows the participant an opportunity to see, hear, touch, smell, taste and experience the brand. It helps them understand the corporate message and ultimately helps them connect emotionally to the brand and the organisation. Success in creating memorable events and messages leads to increased customer loyalty if done correctly.

Event themes must drive all the design elements towards a unified story line that captivates the customer. Themes need to have relevance and they need to connection to the overall message. Themes establish expectations by putting experiences in a recognisable context. Themes builds excitement, create anticipation and promote involvement. The more people engage physically with the brand the more they will remember the brand. Themes and concepts should be designed to reinforce messages, marketing goals and desired behaviour without having to “sell”.
WHAT’S THE BIG IDEA?

While events can revolve around a big idea or the next big thing, many of the most effective kinds of events are actually, at their base, simple and common ones that benefited from a company infusing the event with its own inimitable spin.

No theme is completely unique. Organisers take ideas from the past and put a new spin on them to make them fresh and relevant and brand appropriate. One should never repeat a theme in the way it has been represented in the past. Themes should be clever, innovative and simple. It’s like a bad joke. If you have to explain it – it isn’t funny. Themes should be easy to understand and interpret whilst maintaining a punch line (something fun, surprising and creative).

THEME AND CONCEPT DEVELOPMENT: WHERE TO START?

A theme on its own doesn’t do much. It needs to gain value in 3 ways.

- Firstly, consider what audience members will invest to interpret the experience. In other words, will they take the time to come to the event? What would they pay/invest? The more exciting the theme the more audience members should want to invest.
- Secondly, ensure that the theme is convincing and authentic. For example if using the theme ‘Cirque du Soleil’, does the organisation have the necessary resources needed to pull of this theme? Audience members will expect the full circus experience including the tent, the circus performers, contortionists etc.
- And thirdly, how well will the theme amplify the company’s core concepts. All themes must be brand appropriate and must relay a message. Don’t forget the purpose of an event is to disseminate a message.

PRINCIPLES OF DEVELOPING THEMES

The four key principles used to develop themes are:

1. It must alter a guest’s sense of reality. Guests need to feel as if the experience is all encompassing and real. Putting up one Christmas tree and getting everyone to dress like James Bond is not going to cut it. The guest must feel as if they are living the experience.
2. It must also affect the experience of space, time and matter. The guest must get “lost” in your creation. They should be absorbed not thinking about what they have to do tomorrow morning!
3. The event organiser must create multiple places within a place. This creates more interest and keeps the audience engaged.
4. The theme must fit the character/brand of the company staging experience. Some themes are not appropriate. Themes must be brand and audience appropriate.
THEME ELEMENTS

Themes create the initial hook. They determine what elements (design, décor and decoration) need to be incorporated. Once the theme is identified it becomes much easier to link everything together.

For Example: If the theme was 007 “From Russia with Love”- the concept would be spy vs. spy, mystery, excitement. The twist would be that the event has a Russian inspired flair.

From here the event organiser would be able to link 007 appropriate experiences.

The welcome drink could be called “A White Russian”.

The guests could be urged to wear costumes inspired by other James Bond characters, including villains such as Dr. No or Goldfinger. As for the women, they could dress up as popular Bond girls, such as Octopussy, Honey Ryder, and Mary Goodnight, wearing their sexiest bikinis or evening wear.

The tables could be named according to all the countries James Bond has been to, or towns or famous places in Russia e.g. Red Square, Kremlin, Pushkin, Peterhof, Winter Palace, Bolshoi, St Petersbourg etc.

Servers could wear Russian fur hats and snow boots.

The centrepieces could be big martini glasses with a big olive. Alternatively one could have beautiful entertainers swimming in giant martini glasses at the entrance.

An Aston Martin could be parked inside the venue, roulette wheels, poker tables, and other casino games could be available. Not only will these look like true Bond decorations, but they will also provide entertainment for your guests.

Aside from your fancy casino entertainment, another way to set a good aura for your party is to play the right Bond music. Set up a large TV screen playing clips of scenes from Bond movies.

These examples demonstrate the art of linking the concept and theme to all the experiences guests will have. Make everything an experience from the serving of food and beverages to how guests are greeted when they arrive. The more the theme engages with them the more likely they are to remember not only the organisation but the key message. These links/theme connections are called golden threads. They ensure flow and consistency and ultimately create a memorable experience for everyone.

The theme design and concept should create a unique brand experience and walk away value for everyone involved.

Consider the following:

- Is the theme appropriate and is it in line with the client's objectives for the event?
- Is the theme universal and unlikely to cause offence to anyone?
- Will it be significant to the group?
- How will it be interpreted?
- Will the theme motivate participants to respond positively?
- Will it encourage attendance?
- Could a logo be designed which re-enforces the theme and its message?
- Are there ways to heighten the impact of the theme? For example, would it be fitting to produce saleable theme-logo merchandise?
STEPS TO DEVELOPING THEMES/CONCEPTS

Use concept 1 (the 9 steps involved in designing, implementing and managing an event, to develop the theme/concept), concept 2 (ADMOR), concept 3 (WHs) and concept 4 (CCCVVS).

There are nine steps in this process namely:

1. **Discovery:**
   - Client creative brief.
   - Identify Purpose and Objective.
   - Brand and brand experience.

2. **Research and Development:**
   - Formulate message + find hook.
   - Create storyboard.
   - Develop theme and concept.
   - Program development.
   - Design development.

4. Confirmation Stage Gate.
5. **Planning and Design.**
6. Approval Stage Gate.
7. Implementation.
8. The Event Execution.

**STEP 1: THEME DISCOVERY**

![Diagram of Theme Discovery Process]

*Figure 10: Client Concept Core*
Use The CIF (Client Interview Form) that was completed in Step 1 Discovery to see what requirements the client had for the theme, concept and design portion. Concepts generally don’t start with the Client Brief as clients rarely know what they want or why the event is being run.

**Example of client creative brief:**
Building Company X – “We want an annual conference and exhibition with gala dinner in 2014 for 1000 people. 50% are out of towners so flights need to be arranged. Total turnkey solution required. We also require accommodation for out of towners. The purpose of the event is to reward managers, share information, and allow suppliers to exhibit their products. We want to be seen as the employer of choice and we want to retain staff. The event will be in Feb 2016 during the first or second week of the month. The company is growing and we want to look to the future.”

Client briefs are generally just that…brief. They generally don’t hold a lot of the information needed to produce an event which is why organisers must refer back to The Client Interview Form. However, the example above does give enough information to start developing a theme and concept. It pinpoints the purpose and objective:

- Reward.
- Retention.
- Increased productivity.
- Sales.
- Fun.
- Celebration.

The next step would be to understand the organisations brand and what brand experience they will require.

Continuing using the example above – The building companies brand and brand experience would be:

**Brand words:**
1. DIY.
2. All about improvement.
3. The retail experience – You can find everything under one roof.

**Brand experience:**
Hands on, interactive, engaging and fun.
Helping people do it themselves.
Hook words = DIY, Building, Making etc.

**STEP 2: RESEARCHING AND DEVELOPING A THEME/CONCEPT**

Go back to the client brief and pick out key concepts. Try finding a hook. For example the hook might be DIY, Building, Making, Fixing. It could also be something to do with evolving as the client mentioned “growing and we want to look to the future”.

The organiser could use research to develop some theme ideas. For example, they could google the words “DIY, Builders, Makers, Fixers, evolving”. Let’s say that during this research process they come across some great ideas around the concept of evolution – they could use this as their hook.
They could then research concepts to do with “Evolution”. They could search for videos on You Tube, look for images on Pinterest, google the word evolution and see what comes up. From that they can pull interesting facts, information etc. Create a storyboard filled with all these ideas.

**For Example:** A google search on the word “Evolution” produces the following interesting concepts:

- Apes, Homo Sapiens passing on traits from one generation to another.
- Survival of the fittest.
- Missing link.
- The evolutionary time line.
- The evolution of food, lighting, transport etc.
- DNA, footprints, fossils, rock paintings.
- Evolution of animals and plants.
- Progress.
- How humans have changed – hair, height, goose bumps etc.
- Move around on 2 legs.
- Language and symbols for communication.
- Imprints/impressions.
- Art and music expression.
- Human family tree.
- What does it mean to be human?
- Humans haven’t stopped evolving.
- Progress of humans and technology.

**BRAINSTORMING**

Using this information brainstorm and organise ideas. Grab information + pictures from research that stand out, or that could be a great idea or concept. Sift through and select words, concepts, pictures of interest. The result could be that the theme the event organiser comes up with is Evolution, whilst the concept is about human progress, evolving into the future, growth, looking to the past in order to know where we are going in the future etc.
Research has shown that innovative concepts lead to competitive advantage, increased market share and revenue streams.

Check to make sure that the theme is:
- Easy to understand and interpret.
- Creative and innovative.
- Collaborative.
- Changes consciousness/ attitude or increases relationships, skills and knowledge.

Next, develop a concept/theme story. A theme story leads the person on a journey of discovery.

The event organiser must make sure that it’s a story worth telling. It must captivate audience. The story must include both the written interpretation and the visual interpretation of the “story”.

A concept is a story told with two major components namely:
- Content (What is being told).
- Form (How it’s told).
The key to developing memorable and cohesive themes is in developing not only the concept (visual interpretation) but in equally developing the content (written interpretation). The event organiser must ensure that they have consistently incorporated the theme in both areas.

For Example: Using the evolution theme – for content the invitation could feature words like “RSVP today…don’t be the missing link” or “Be involved and evolved – RSVP today”. The presentations for the events could have images of the evolving monkey to man graphic. The speakers could build in the concept of “survival of the fittest”, “progressing into the future”. The program outline could feature an evolutionary timeline but instead of the time line of humans/dinosaurs it could have the start times, pause breaks, finish times etc.

For the concept – visual interpretation of “Evolution” the program flow could be designed to “evolve”. The entertainment could feature a cello musician in a “bubble ball” depicting amoebas which were around in the days of the dinosaurs. They could depict plant, cell evolution. An evolutionary speaker or MC could be brought in to open the event. For the décor there could be fossil light towers lighting the entrance to the event. The idea of how lighting has evolved could be used.

There could be candle light in some areas, progressing into more advanced types of lighting like LED lights. The tables could be LED tables. The food could also tell the story of evolution by having the starter be raw uncooked foods like nuts, sushi, and salad. The mains could be meat, whilst dessert could be very fancy. This would depict how food has evolved.

This would all culminate into the concept/theme “Story”. Here is an example.

“As guests arrive for the evening Gala Dinner they will walk down a 3D stretch panel entrance with images of evolution through them. Going from ape to modern day man -projected with lights. Gobo lights to project words of “Evolution” or even the different time lines. At the bar area we can have stilt walkers (to reflect how man has grown taller over time – 10cm in the last 2 centuries). They can also be the welcome drink servers.

Bar can be made out of ice reflecting the ice age and how plants and animals have evolved. The indoor environment: This will represent an outdoor environment with stars in the “sky”, trees around the tables, grass etc. Think Garden of Eden! Human trees can depict “human tree of evolution”.

This example not only depicts how golden threads are used to link all the areas together but also shows how to tell a story using both the content and the concept. This is the key to delivering powerful themed events.

Tips: VMC. Visualise, conceptualise then materialise the event.

Visualise: Think through what guests will see and experience from beginning to end.

Conceptualise: Then think through design elements and how these will fit into the logistics.

Materialise: Putting everything together. Can it be done?
CONCEPT WHS

Next, consider the WHs of the concept/theme.

- Who? For whom is the concept meant?
- What? What’s the essence?
- Look beyond the obvious.
- Insurance companies sell “peace of mind” not insurances
- When? What is the moment the concept is consumed?
- How: What is to be used to give the audience the message?
- Why: The purpose. Why is it important?

STEP 5: PLANNING AND DESIGN

Once the event organiser has dissected the client brief, researched and developed the theme and concept, brainstormed ideas, developed ideas for content and the concept, considered the WHs that pertain to themes, and developed the storyline they are finally ready to plan the theme/concept elements.

Theme planning includes planning for the design, operations and risk components. It also includes an administration component. In the planning stage consider whether the theme meets the needs of the client and the customer, if the venue best reflects the theme, and whether the vendors can deliver the theme and convey the message. [Refer to Step 5: Planning and Design Section]
Once all these areas have been considered, the event organiser must consider how the design, theme and concept will be translated into the catering, content, invitation, environment, production, program, promotions, entertainment and promotions.

For Example: Using the “Evolution” theme – the food and beverages (catering), the starters could be presented to guests on slabs of wood and banana leaves. The dessert could include fondus where guests have to “cook/dip” marshmallows or fruit simulating the experience of prehistoric man cooking food over fire. The room could feature hanging lights that resemble cave stalactites and stalagmites, LED tables with plant terrariums as focal points. They can also double up as table numbers. The base plates could feature natural elements such as sand, pebbles and wood – reflecting earthiness. The other areas have been covered in previous sections. But this demonstrates how the theme must be linked to all areas of the event in order to make it dynamic.
Once the event organiser has brainstormed the design, consider how the theme will be linked to the marketing domain. This would include ensuring that the theme is visible on the invitation, that the marketing materials and merchandise are theme appropriate, that any public relations activities have a theme connection, and lastly that the sponsors are depicted in a theme appropriate manner.
Next, consider the operational and risk domains. What will need to be planned for operationally? What risks could be involved in the design elements. These are some of the considerations the event organisers must think through. All design and theme elements that culminate into an action or task will have to be planned for. Utilise the diagram below as a checklist to ensure that all angles are covered. [Refer to Step 5: Planning and Design – Operations for more information on this section].

**Figure 16: Operations Brainstorming Core**

At the end of this entire process the event organiser should (if all steps have been completed), have a fully fledged, cohesive, comprehensive theme that is brand appropriate and innovative.
DEVELOPING THE EVENT STRATEGY

DEVELOPING THE EVENT STRATEGY

In order to develop an event strategy for the event, define the scope of the project. Think through and research how each of the areas below will affect the entire event. Identify WHO needs to complete each task/activity as well as WHAT will need to be done. Summarise planning and design scope here. This will give a snapshot of who is doing what, when and how. It is an executive summary overview. Use a RAACI document for more complex events.

Scope: Refers to the extent of the area or subject matter that something deals with or to which it is relevant. The first step to managing a project is to identify and define the scope. The success of the project relies on identifying what needs to be done, WHO needs to complete each task, when it needs to be completed by as well as managing scope creep. The WHO component is covered in the next section.

Scope creep management is important for effective project management. Projects are expected to meet strict deadlines with resource restraints, and an unvetted roved change in the scope can affect the success of the project. Scope creep sometimes causes cost overrun. It is important to understand scope and scope creep when managing suppliers.
SELECTING AND SOLICITING VENDORS, VENUES AND SPEAKERS

The process of selecting and soliciting vendors, the venue and speakers will begin in Step 2: Research and Development, and will be continued through to Step 3: The Proposal Delivery; Step 4: Confirmation Stage Gate; Step 5: Planning and Design; Step 6: Approval Stage Gate and Step 7: Implementation.

As mentioned in previous sections, the event organiser must identify the vendors before confirming the venue and speakers as the vendor’s requirements will have to be determined so that the venue can be matched to those requirements.

Vendors, venue and speakers are commonly referred to as suppliers. Suppliers are important to the overall event team and are considered as stakeholders as they have a “stake” in the event. Event organisers can contract any number of different types of suppliers everything from catering, to décor and design to production. Depending on whether an organisation will manage the event in-house or outsource all or part of this function is a decision that both the event organiser and the client must agree upon.

SUPPLIER SELECTION

The supplier selection process will begin with identifying potential suppliers. The suppliers selected to provide services for the event are an important part of the event management team.

Although the contractual agreements will outline the specific services, timelines, and terms of delivery and payment, the working relationships and ongoing communications ultimately determine the quality of the services received. Event organisers typically identify two to three potential suppliers for each service required based on the scope of work required. The event organiser will then assess and research the suppliers ensuring that they are compliant and competent. They will assess their value added services, prices, quality, delivery of services and reputation and credibility.

Next, the event organiser will validate all the information which may include reference checking, probing and asking questions etc., then the appropriate supplier will be selected, awarded the job, followed by the contracting of the supplier.
SELECTING AND CONTRACTING CATERERS

As the organiser of the event, select the caterer that is able to handle the specifications for the event to be held. The organiser should be familiar with the standard catering contract policies in order to negotiate and execute the proper agreement. Information from the contract will be transferred to the Banquet Event Order (BEO), an internal document used by the catering staff listing the menu, set up, and other details for the function.

A catering contract includes the following:
- Day(s) and date(s) of the event.
- Starting, sending and serving time.
- Location of the event.
- Number of guests.
- Date for final guarantee.
- Minimum number of guests.
- Charges for additional guests.
- Food and beverages selected.
- Staffing levels.
- List of charges:
  - Food and beverages: The itemised quantities, quality, and per – person or per – item prices.
  - Taxes.
  - Gratuities/service charges: The obligatory charges for service personnel. This amount can be added automatically to your invoice and can be based on as much as 15% gratuity on the food and beverages. Check this with the caterer so as to avoid any unforeseen costs.
Tipping: The optional amount paid to service personnel based on extra or exceptional service.

- Equipment charges.
- Setup charges.
- Room rental rates.
- Site commissions.
- Overtime/other staff rates.
- Corkage charges: These refer to charges should food and beverages be brought on site by a company or client or cater that the venue is able to supply.

- Deposit policies and dates.
- Refund and cancellation policies.
- Alcohol service policy.
- Leftover and brought – in food policies: Such policies specify what is to be done with leftover food. Because of product liability concerns, most caterers typically do not allow leftovers to be taken by The Client. Outside food brought in by The Client or guests, unless agreed to by the caterer/or The Venue may be prohibited or charged for as corkage.

**SELECTING AND CONTRACTING ENTERTAINERS**

*Booking and securing entertainers* requires background knowledge of genres and types of music, production experience in staging, lighting and sound and being able to communicate in the same ‘biz’ terminology.

Using a talent or booking agency will save time, reducing the time it takes to track down the right talent, negotiating and preparing contracts. An internet search will turn up dozens of options with most able to book just about anyone. Agencies typically charge 10 to 20% commission on top of the band’s price. However, they keep this in mind when suggesting talent. Start by briefing them on the event, give them the budget then allow them to explain what they can do. Request information on the booking procedures including what percentage they charge and what level of service is expected.

If hiring a DJ for the event, the most important quality is their personality as it will greatly influence the success or failure of the event. A DJ with an engaging personality and a good play list can intuitively create the mood and will ensure guests are well entertained. Meet with the person who will be working the event and spend enough time with them to determine if they are a good fit with for guests.

**QUESTIONS FOR BANDS AND ENTERTAINERS**

*General Information:* Are they available for the event date? Have they ever played for an event of this type? Are they an appropriate fit for the event? How many members are in the band?
What do they charge? Price is usually based on popularity and/or number of band members. Do they have a press packet and/or promotional photos the client can view?
Music: What types of music do they play? Ask for specific song examples or a song list. If the organiser has not heard the band before, they should ask for several play dates so they can go and listen to them.

On-Site: How many sets do they play? What is the length of the sets? Do they provide taped background music during their breaks between sets? What must they wear? Etc.

Production Requirements: Have they ever played at the facility where the event is? If they haven’t played the facility, explain the facility to them (i.e. size, ceiling height, etc.) and then enquire about the sound system they will be using. What are their electrical requirements? Do they provide a lighting system? Do they provide all their own instruments? Do they provide staging? Is staging required? What size and configuration? Ask for a stage plot; it will detail all requirements they require.

Other Requirements: In dealing with larger acts directly or working with a talent agency or booking agent, they will provide the event organiser with the band’s rider. This document details everything ‘extra’ the event organiser has to provide, in addition to the agreed performance fees; including transportation and accommodations, food and beverage, etc. (think green MandM’s).

Contracts: What is their cost and what exactly are you getting? If budget is limited, let them know as some bands will often work for less if you just ask. Ask if the band has a contract. If they do not, use the contract in letter form to draft the agreement. Make sure everything is covered: date and place; exact number of band members; attire; set-up times and requirements; payment terms; and deposits. The rider is also provided as an attachment to the contract. Remember, they use the same contract for everyone. Never hesitate to negotiate terms; cross out what doesn’t pertain to the event, initial and send back for a countersign.

QUESTIONS FOR AV COMPANIES

Choosing a company to provide audio visual services for your event can be daunting to those with little or no experience. Having some basic information and decisions made before collecting quotes from service providers can save you a lot of time.

Outline the project: Before contacting any service providers, iron out how the program. Will there be one speaker behind a podium or various people roaming the stage at times? Must the audio visual company provide stage management services or just run the equipment? There is a world of work to be done in between.

Determine the extent of the program and budget: What type of function is it? The style of the event will demand a different presentation format. Some companies are content to rent equipment and stop there, leaving it to the event organiser to figure out how it works. At the other extreme,
full-service firms handle everything from concept to presentation. The degree of assistance provided varies, and not all is provided free of charge.

**Check references and observe in action:** In addition to asking for and calling references, ask to observe an upcoming event the company is producing that will be similar to yours. If none are planned, ask to see some photographs or digital images of previous events held locally. If they have nothing, be curious about the reason. When contacting references, ask about the company's record of meeting intermediate project deadlines. How were the technicians on the job?

**Schedule a Rehearsal.** To ensure a smooth presentation, experienced planners recommend a rehearsal. The audio visual company should agree to a pre-presentation rehearsal to coordinate individual's presentations with lights, sound and video. Typically, this is set a few hours before the event. Be sure to ask if there are any charges for rehearsal time.

**Get at least three estimates:** Historically, in-house service providers are the most expensive. Make sure the estimate includes all the necessary elements. Be aware of additional charges. It helps if the audio visual company has a working knowledge of the venue chosen. If not, schedule advance meetings at the site to go over the program and the requirements of the location.

**What equipment do they have?** Companies' technological abilities may vary. How diversified is the audio visual company? You may need a simple overhead projector, or your ideas may require image magnification equipment like data/video projector. You may also require lighting, a sound system and entertainment? If you do not know what is needed, in terms of equipment, look for a company that offers options to suit various budgets: from a simple VCR and TV combination to a more advanced presentation service.

**Choose with confidence:** Finally, after narrowing the decision between service providers choose the company that had the staff who made you most confident. Having all the equipment in the world will not deliver the presentation solutions required unless the audio visual staff is professional, motivated, and client oriented.

**On Site:** When do they arrive for setup? What equipment are they bringing? When will they do a sound check? What is their backup plan? Will they allow you to make announcements using their sound system? What do they wear? What happens if you go into overtime?

**Contracts.** What is final bid cost and what exactly are you getting in the way of equipment, time and personnel? Be sure the critical items are all included in the contract: service date, location, setup and start time. What is the overtime rate? When are deposits due? When will final payment be made? What provisions have been made for non-performance?
Other Considerations. What is the Company’s Level of Experience? How much will you have to educate them before they can help you? How diversified is the company? Can they supply all of the equipment themselves or do they sub-contract a great deal of the equipment?

Entertainment may be passive, interactive, decorative, instructional, interpretative, inspirational, musical, verbal, visual, ritual, and/or culturally indigenous.

To select and book the best entertainment for an event, define the specific goals and objectives for the inclusion of entertainment and the conditions and restrictions for booking entertainment and attractions. Make the best choices, based on the resources available, and execute the proper the proper contracts with the entertainers selected. Finally, monitor and assess the value and effectiveness of the entertainment elements for the event.

- **Assess the Needs and Resources:** Entertainment must support the purpose and objectives of the event. This may include adding excitement, enhancing the flow and pacing of the event experience, expressing appreciation to the audience or focusing attention on important images and messages.
- **Preview before Contracting:** As the organiser, preview entertainment acts and performers before booking them.
- **The Offer and the Agent:** The booking process often starts with an Artist Offer Letter, authorised by the purchaser (The Client), and extended to the performer from the event organiser through the booking agency. This letter outlines the terms of the engagement, contract price, and other contract costs (rider specifications) and/or conditions. The artist then decides whether they will accept the offer. Once the artist accepts the offer and engagement agreement or contract is issued.

---

Figure 18: Entertainment Booking Process
ENTERTAINMENT CONSIDERATIONS
Sourcing, securing and booking.
Payment.
Rehearsals.
Dry run.
Technical production management.
Build up management.
Artist travel, transport and flight management.
Contract management with artists.
Sending technical riders and stage plots to AV companies.
Type of entertainment.
Name of entertainment.
Where will entertainment be?
Contingency plans.
Awards management.
Scripted show.
Timing/number of sets.
Costumes.

PERSONNEL
Makeup artists.
Choreographer.
Show caller.
Stage manager.

THE FOLLOWING MUST BE OBTAINED FROM THE ENTERTAINER:
Stage plot.
Technical rider.
AV cues.
Lighting cues.
Holding room requirements.

THE RIDER

A contract rider is a list, specific to each entertainer or entertainment act, of what the performer requires in order to perform or make an appearance. It “rides” or is attached to, the contract and includes everything from transportation to technical requirements to the type of food and beverages required. It is a legally binding part of the contract between the artist and the purchaser, but some points within it may be negotiated prior to the contract.

The technical portion of the rider, which includes all the equipment and staging requirements, may also include a detailed description of the stage plot, including a diagram showing the layout of the stage, the artist’s position, and where all the equipment, microphones, props, and so forth, are to be positioned.
This portion can be accompanies by an entire production list including lighting plots, audio equipment specifications, power distribution requirements, and the provision and number of stagehands, riggers and costume assistance.

The larger the act, the more complicated the rider will be. Some riders are considered proprietary information, because they show exactly how to a certain performer achieves certain special effects and are therefore not issued until after the acceptance of the offer.

**Rider Requirements Checklist**

- Accommodation – number and type of rooms (smoking, non-smoking, suit, single, sharing etc.
- Advertising content and context.
- Approval of announcers (MCs) and other performers.
- Artists billing – placement of name in ads and signage.
- Broadcast rights and performance reproduction.
- Control over all technical and performance aspects.
- Credentials and passes – types and distribution
- Dressing rooms – size, proximity to stage areas, amenities.
- Equipment – use sharing restrictions/prohibitions.
- Entourage – artist’s table, comp tickets, hospitality.
- Food and Beverages – types, schedule, placement
- Insurance requirements.
- International travel – procurement of visas, work permits, customs, entrance and exit fees, per diem etc.
- Interviews and special appearances.
- Load in/Load out – schedule and priority, personnel requirements.
- Merchandising – sales and concessions.
- Musicians – additional and separately contracted.
- Percentage of ticket sales.
- Performance – sets, duration, timing.
- Prohibition of cameras, filming, video recording in audience.
- Security requirements and deployment (stage and venue).
- Sound check – time, duration, authorised personnel, rehearsals.
- Sponsor recognition restrictions.
- Storage requirements.
- Technical rider requirements – specifications on types and placement of staging, power, equipment, sound, lighting, backline etc.
- Transportation – flights (class, schedule, and approval), ground transfers, types of vehicles, power for tour bus/van etc.

**VENUE/ SITE SELECTION PROCESS**

**OVERVIEW**

*Selection of the event site* is a critical factor in the success or failure of the event. The site selection process must meet the needs and requirements of the event.
The site selection process involves:
- Identifying the event objectives and the clients’ expectations and requirements.
- Gathering historical data.
- Determining the physical requirements of the event.
- Considering the attendees expectations and requirements.
- Identifying suitable sites.
- Comparing sites.
- Choosing the site.
- Contracting the selected site whilst ensuring it meets design and costing requirements.

![Event Selection Process Diagram](image)

**Figure 19: Event Selection Process**

The choice of venue is influenced by:
- The purpose of the event.
- Event requirements (e.g. break away areas, refreshments, etc.).
- Location of the venue.
- Facilities offered at the venue.
- Equipment available at the venue.
- Cost of using the venue.

It is most important that the facilities that are required by the client be clearly defined at this point of the event coordination process.

The following are important aspects to consider in venue selection:

97
• Location.
• Facilities for conferencing.
• Facilities for “free time” activities.
• Suitability to a theme.
• Access.
• Effectiveness of the staff.
• Customer service.
• Location of toilets, parking and entrances.
• Perceptions of the venue, or interest in the venue.
• Corporate arrangements (links to certain hotel groups etc.).

**Site selection** for the purpose of an event can range from a small room in a borrowed or rented building, to an outdoor park, sports stadium etc. Most importantly, the location of the event should be readily accessible, easy to find, and located in a safe area. The site must be capable of fulfilling the requirements of space, electricity, bathrooms and other amenities to handle the event, and be of a proper construction, meeting zoning regulations and offering a contract to provide a seamless event with the least amount of hassles.

Selection of a site relates directly to the event function, and the degree of surety required for the event to proceed. Exposed sites, such as when events are held outdoors, may be subject to inclement weather, which is capable of shutting down an event or greatly diminishing the number of guests who attend. A site venue with inadequate parking may deter guests from attending as will the selection of a site in a crime-riddled or dangerous area.

The perception of the site itself is key to a successful event. It may prove difficult to attract interest for a boat show in the middle of a dry parking lot, as it may prove wildly successful to sponsor a tractor pull at a local fairground. The site itself must lend its own sense of anticipation and excitement to the event. Modern structures with grand scaling, parking garages, rich interior details, and carefully designed floor plans are suited for events, making such venues perfect for providing a site to host a memorable occasion. Hotels are always a suitable option, filling the lodging needs of out-of-town travelers, offering ready provision of catered food and beverages, and large rooms for classes, banquets, or vendor displays. In addition, they are usually located along major routes, may provide shuttle services to airports and train terminals, and can greatly reduce event-staffing costs.

Event venues are locations where events are taking place. The definition of an event venue can be as endless as the stars in the sky; thus, when selecting the perfect venue for that important event, the sky is the limit. An event venue in simple terms is the location hosting an event. Some venues are more common than others are, but there is a never-ending list when creativity comes into play.
Traditionally, a meeting room, hotel, conference centre, restaurant or convention centre may come to mind when envisioning the stage where large, note-worthy events are held. However, in today’s world where making a great first impression and expressing one's own style has never been more important, there are many newcomers on the traditional event stage. Ballrooms, gardens, rooftops, museums, theatres, yachts, stadiums, universities and even outdoor venues are becoming the norm in providing a unique, tasteful backdrop in creating the perfect atmosphere for business-to-business forums, as well as weddings and private parties.

Depending on the premise or desired outcome of the planned event, the selected venue can make a tremendous impact. Often guests leave with an overall impression or feeling of a business/person based solely upon their sentiment provided by the atmosphere of the event, as opposed to the product/purpose on display. The memories linger when an event provides welcoming warmth and invites a personal connection to be obtained by the attendee. Finding the location is a key element in planning the perfect event.

Intimate, smaller groups may find a large conference centre superb and projecting an isolated atmosphere. A rooftop, meeting room, restaurant, yacht, garden, or museum could be a more appropriate location to make this a more personal affair for the lower-numbered crowd. In contrast, a larger group might find such settings too personal and prefer a little more elbowroom.

Venues designed for events with a larger number of guests include conference centres, convention centres, hotels, some restaurants, theatres, ballrooms, some gardens, mansions, universities, outdoors, stadiums and yachts.

Conference and convention centres provide an ideal fit for events desiring separate spaces for smaller group meetings while including an area for everyone to convene into one large unit. These centres typically house all the equipment necessary for making presentations/dining for crowds, which trims down the amount of resources the host of the event must supply. Considering the essential supplies needed to complete the event is vital when selecting the appropriate venue. Similarly, weather is an element not to be forgotten during event venue selection. Gardens, rooftops and any space outdoors must include a back-up venue in case of inclement weather.

Consider the following before choosing a site:
1. What is the purpose for the event?
2. How many people will be invited?
3. What type of set up will you have i.e. Banqueting rounds, standing etc.?
4. Are screens and a stage required?
5. Emergency and evacuation plans?
6. What requirements are deal breakers?
7. Height of ceilings?
8. Floor dimensions?
9. How many entrances and exits does the room have?
10. Do they have panel lighting?
11. What restrictions are there?
12. What is included and excluded?
13. Do they provide insurance?

Important considerations when choosing your facility include:

- **Look**: Does the facility have the right look and feel for the event? Is it clean and tidy? When was the last time it was updated?
- **Size**: It shouldn’t be too small or too big. Does the facility understand the type of event – sit down dinner versus stand-up cocktail reception, and can communicate to you if the space will work? Is there a way to change the size of the room with air walls or dividers if your numbers change?
- **Parking**: Is there enough? Does it cost? How far will the guests have to walk? Do they offer valet services?
- **Convenience**: Is the location easy to find and easy to get to? Will people with special needs be able to access the facility? Is it simple to find your way and get around once inside the venue? Is directional signage required, how will it be displayed and who will provide it? Where are the restrooms and pay phones in relation to event location? What doors will the guests use? What doors will the staff use?
- **Amenities**: What else does the venue offer that can enhance the event? Does the client need overnight accommodations, break-out rooms for meeting space, a swimming pool, intercom system, extra storage space, coat check, etc.?
- **Vendor relationships**: Do they have their own in-house suppliers for food, beverage, audio-visual, decorators, etc.? Do they require the event organiser to use in-house suppliers or will they allow them to contract their own suppliers?
- **Supplies**: Does the facility have enough tables and chairs? What sizes and styles? What kind of dishes, silverware and glasses? Do they have the right buffet supplies – chaffers, trays, etc.? Can they provide linens? Do they have any decorations or centerpieces that can be rented? Do they offer coat racks, a stage, dance floor, piped in music or sound system, podium, microphones, etc.? If so what is the charge including service and tax?
- **Decorations**: What can and can’t one do in the venue? Specifically ask about confetti (or any other small particle pieces like snow machines or sand) and candles. Can one hang things from the ceiling and if so, where are the rigging points and do they have ladders or lifts available? Will they allow signage and how must it be affixed? Will items need to be shipped or brought in days prior to the event and can they receive and store them? Is there a cost for that? Is there a location to store boxes and containers until time to clean up?
- **Set-up**: How will the room be configured? Can they provide you with diagrams? Who does the actual set and tear down of the fixtures – you or the facility? If it is the facility, are there extra charges? Could overtime play a factor?
• **Accessibility:** When can one get into the facility? When does everyone have to be completely out and does that meet scheduled needs? Where will vendors load in/load out, is there a loading dock, elevators, etc. and how far away are they from where the event will be? Where is the kitchen in relation to the event? Where are the electrical outlets? Who controls the temperature?

• **Contracts:** What are the cutoff dates for your guarantees? What is their set-over policy? What is the clean-up/breakage policy? What are the penalties for canceling the event? What rules and regulations do they impose? What perks or extras is the facility willing to throw in?

• **Price:** Are there extra and hidden charges that need to be divulged? Do they charge for electrical usage? What is their ‘plus-plus’ – the dreaded tax and service charge?

• **Staffing:** Does the facility have adequate staff to work the event? What will be the ratio of servers to guest? Bartenders to guest? What is the chain of command and who will the contact person be? What will the staff wear? Will there by a maintenance person or electrical engineer on stand-by? Are there extra charges for this?

• **Insurance and liability:** Does the facility carry adequate insurance to cover the event? What is their alcohol policy? What kind of security do they provide? What is the venue’s plan for fire, disaster and evacuation? Does the facility have all the proper health, fire code and occupancy certificates and permits? Will the event organiser be required to obtain additional permits? Will the facility be doing any remodeling or construction that could negatively affect the event?

• **Usage:** Are there any other groups in the facility at the same time? Who are they, what do they do and what does their event entail? Will they have music or entertainment that could interfere with the event? Who will be in the room immediately prior to the event? Could their event run over causing delays? If this happens, what will the facility do about it and who will pay for any unexpected overtime? What happens if the event runs over? What will the costs be for any additional usage?

• **Other policies:** What is their alcohol policy? Some facilities are licensed to provide alcoholic beverage service while others who are not licensed will allow service through your caterer, beverage service company or other source. What is their smoking policy? Some facilities have a no smoking policy while others have specific areas designated for smoking. What is their security policy? Do they require the event organiser to hire internal security from the facility or can the event organiser contract their own? Is there a noise policy? Some facilities require the band or music stop at a certain hour.

---

**FINDING AND SECURING SPEAKERS**

**OVERVIEW**

When it comes time to develop the program content, there are several variables and methods to consider in conducting research and *identifying the right speaker.*
For larger events where multiple speakers are presenting, a manager may choose to start the search by sending out a speaker Request for Proposal or issue a Call for Papers. A speaker’s agency may be another option and can help your selection process by narrowing the search and screening potential speakers. Consider maintaining an ongoing physical or electronic file to collect information on speakers you have encountered and found effective.

**TYPES OF SPEAKERS**

**Professional Speakers:** A professional speaker is a speaker who is paid a fee for performances and makes a living by presenting information on various organisations. A professional speaker is typically polished, effective orator, who is capable of making a presentation in a style that satisfies the audience’s need for information, advice, or entertainment. They may be a subject expert and/or an expert speaker.

To lay the foundation for an excellent event, here are some steps to consider before retaining a speaker:
- Verify references.
- Arrange to see speaker deliver a live presentation.
- If seeing a live presentation is not possible, view a video or a live presentation.
- Schedule a conference call with the speaker.

Do not assume that a professional speaker can present on any subject. If requesting a topic other than the speaker’s usual material, before signing a contract ask for outlines and, if possible, written text to be sure the topic will be covered appropriately.

**Volunteer Speakers:** Are generally not professional speakers. They could be members of an organisation, or somehow linked to it, and are asked to speak as content experts.

**Speaker Agencies:** An alternative to searching for speakers directly is to work with a speaker agency. As a professional broker or agent for many speakers they will be able to recommend the most appropriate speaker for your requirements. They can facilitate the entire process from securing, booking and managing the speaker. Most agencies are paid a commission by the speakers and do not charge those planning the meeting.

Consider the following when considering using a speaker’s agency:
- How long have they been in business?
- Do they in fact represent the artist, speaker?
- Can you contact the speaker directly before making a decision?
- Is the agency reputable?
- Request a copy of the contract to view before making any decisions.
CONTRACTING/BOOKING A SPEAKER

• **Offer Letter (Affirm):** When you have verified references and have decided to hire a speaker, prepare an offer letter. This is the negotiation phase of the agreement. Do not confuse an offer letter with an agreement or contract. [Contracts are covered in Step 7 Implementation.]

• **Speaker Compensation and Benefits:** Most professionals choose not to negotiate or make exceptions to their fee schedule. However, there may be circumstances that allow for a reduced fee. Some professional speakers offer a local fee if the event is within driving distance from their home. Occasionally allowing the speaker to sell products is enough incentive for a lower fee, provided the audience is large enough.

• **Speaker Contract (Confirm):** The speaker agreement or contract contains all the stipulations agreed to in the offer letter. The speaker contract is implementation side of the speaker selection. All changes to contracts must be agreed to by all parties and should be done in writing. Focus on how issues such as cancellation or no shows will be handled. This includes reimbursement policies etc.

• **Final Details (Reaffirm):** As the event date approaches, communicate again with the speakers to ensure everyone is on the same page. You can send the speaker The Event Executive Summary (EES) – covered in Step 7 Implementation.

It is advisable to use this checklist:

- Date, time, and location.
- On – site point of contact or host.
- Location and hours of registration.
- Location and hours of the speaker ready room.
- Start and stop times of presentation.
- Program outline for the event.
- Presentation topic.
- Schedule of extra events.
- Speaker agreement for participation in extra events.
- Hotel room confirmation.
- Flight and travel confirmation.
- Ground transport confirmation, schedule, route, map, directions etc.
- Speaker attire.
- Contact numbers and emergency number.
- Audio + visual requirements.
- Set up, breakdown and rehearsals.
Step Three
Proposal Delivery Phase
COVERED IN THIS SECTION:

INTRODUCTION
THE PITCH AND THE PROPOSAL
THE DECISION
THE QUALIFICATION MEETING
CHAPTER 6: STEP 3: PROPOSAL DELIVERY

INTRODUCTION

At this stage an event strategy proposal is a compiled and written. The event proposal contains the framework for how the event will developed, designed, implemented and managed. It defines the event concept and demonstrates how this will be integrated throughout. The proposal will culminate into a presentation that will be pitched to the client. Use the checklist below to develop the proposal and pitch.

A proposal is the blueprint from which the event is built. It is the starting point, from which the planner can see the overall design and how it needs to be constructed. A properly prepared proposal requires intensive research and development. It is the stage where event planning and execution must come together and the whole thing must be doable. A proposal is not just fluff or creative concept, but must be structured with substance. It is made up of hard facts presented in a pleasing manner, and must contain sound information, because once it is prepared and presented, it becomes the base from which key decisions are made.

The proposal is the centre core of the proposed event, and it must be rock solid. The language and inclusions will change based on the industry but the application remains the same.

THE PITCH AND THE PROPOSAL

The event blueprint will help the event organiser work out what needs to be included in the budget and proposal. Only once the client has signed off on the proposal, will the event organiser be able to begin planning.

The process may require numerous meetings to get to the point that all items have been decided on and you are ready to sign the contract. It is comprised of all the details around the event. This will give The Client an indication as to whether you have thought through all the processes and steps. When it comes to finalizing the details, the client will be looking for your expertise to guide him through the financial process and the entire proposal.

The proposal is an estimated invoice for an event. Many clients will request a proposal prior to your initial meeting. The proposal will outline the food costs, beverage estimates, room charges, taxes, and gratuities plus additional services such as flowers, rentals etc.

The proposal speaks volumes about the quality and care the actual event will receive. It clearly shows the client the work ethic and the level of standards the event organiser holds. Are they attentive to detail? Are they thorough? Have they considered every angel? All this will show up in the proposal. If there are holes in the planning they will show up here. A key step in producing a successful event is to produce a complete and all-encompassing event proposal.
THE DECISION

Once you have pitched to the client, if you have been successful and have been granted the project, you will be asked to come back to the client with a revised copy of the budget and proposal. Generally clients will change a few line items either taking things out of the budget or adding new items in. They may change the number of guests or even modify the theme. The job of the event organiser is to then revise the information and get it ready for the qualification meeting.

THE QUALIFICATION MEETING

Diving right into the proposal, as important as that obviously is, is putting the cart before the horse. The proposal request is the shell from which planners build the event. Just as you wouldn't build a house on a shaky structure, planners can’t begin to construct a successful event without a solid foundation of information.

The proposal request provides planners with an outline, that in most cases, will not give them enough detail and knowledge to be able to bring in strategic event planning techniques that will work towards meeting event objectives, but will least be a starting point for the planning process.

A single representative from the company requesting the proposal may attend the qualification meeting or planners may meet with committee members who will be in charge of the event. The company representative or committee (which can range in size from two or 20 or more) may be in charge of reviewing the proposals, narrowing down the choices and putting their recommendations before company executives for the final selection.

The qualification meeting occurs when both parties get together to finalise the project and go over the budget one last time before signing the contract and budget annexure. There may be one or two qualification meetings depending on the number of decision makers involved and the scope of the project. For example there may be one meeting with the marketing department and another with the legal department. Once all items have been agreed to the contract or Service Level Agreements will be signed (either onsite at the meeting) or a copy will be sent to you after the meeting. Only once everything has been signed off, the event organiser can begin the actual planning of the event project.

The qualification meeting is essential to ensure that both parties have outlined what they expect for the project and to confirm who will be responsible for what, when and how.
THE PITCH AND PROPOSAL CHECKLIST

CONSIDER THE FOLLOWING:

What format will the proposal be in?
Who will be responsible for developing and compiling this?
Time allocated to pitch.
Proposal medium (word, PowerPoint etc.).
Proposal plan/structure.
Packaging.
Production.
References.
Partners.
Proposal strategy.
Personnel.

CHECKLIST FOR EVENT PROPOSAL

Cover letter.
Title page.
Proprietary notice - cautions about unauthorised disclosure.
Table of contents.
List of abbreviations.
Executive summary.
Body of proposal:
  - Profile of the event company:
    - General: including mission, background, credentials.
    - Specific: including previous similar events and resources available.
  o Project partners and their profiles.
  o Event specific information:
    - Objectives.
    - Scope of work.
    - Stakeholders.
    - Themes, design and ideas.
    - Site/venue assessment.
    - Resources required: AV, entertainment, catering, staff and suppliers.
    - Marketing and promotional services needed.
    - Possible sponsorship.
    - Budget - corresponding to functional areas of program elements.
    - Control management - reporting processes, organisation structure responsibilities.
    - Schedules - planning, transport, running order, promotion.
    - Environmental impact - natural environment, traffic, transport.
    - Risk issues including insurance.
THE PITCH CHECKLIST

CONSIDER THE FOLLOWING:

How will the proposal be delivered?
What will the pitch focus on?
Who will present the ideas?
Theme ideas?
How much time do you have to pitch?
Equipment required?
Room set up?
Who will be attending the pitch?
Expert suppliers.
Q and A’s.
Time allocated to pitch.
Who will deliver the ideas?
Where will the pitch take place?
No. People pitching to?
Step Four

Confirmation Stage Gate Phase
COVERED IN THIS SECTION:

INTRODUCTION
EVENT ELEMENTS TO CONFIRM WITH THE CLIENT
CHAPTER 6: STEP 4: CONFIRMATION STAGE GATE

INTRODUCTION

The confirmation stage gate is the stage used to describe a point in a project or plan at which development can be examined and any important changes or decisions relating to costs, resources, profits, etc. can be made before moving onto the planning and design stage. The client will confirm that they are satisfied with the initial concept and proposed event strategy. Small changes and modifications that do not affect operations and logistics can be made until Step 6. The event organiser must always refer to the contractual agreements in place ensuring that changes made do not affect this agreement.

The confirmation stage gate step will take place when the event organiser has been awarded the event project. The initial information proposed will need to be confirmed so that you can move into the planning and design stage.

The client must physically sign off and confirm the final quantities, event date, venue, which vendors will be solicited, agreed upon budget, timings, schedules and programs, administration plan, design plan, marketing plan, operations plan, risk plan and concept/theme.

More detailed information on each of these areas will be covered in upcoming chapters.

EVENT ELEMENTS TO CONFIRM WITH THE CLIENT

The following must be confirmed before moving onto next step:

• **Agreed upon quantities/pax:** Verifying attendance is fundamental as logistical and operational plans rely on this information. It will affect food and beverages, flights, accommodation, seating etc. Most venues will accept a minimum and maximum number at the beginning of the booking, but will require a final number 2 – 4 weeks prior to the event. The event organiser must refer to the venue agreement in place, paying special attention to the section on “final numbers”. Most venues only allow 5 – 7% decrease in numbers in the last month prior to the event. The event organiser must make the client aware of these conditions and agreements so as not to incur unnecessary charges.

• **Agreed upon date:** Confirm the event’s date if this has not already been done.

• **Agreed upon venue:** Confirm the site or location for the event. The event organiser can therefore book, confirm and pay the venue in order to secure the venue. This will avoid losing out on the venue booking and having to start the whole process again. The venue can prepare the contract, secure the rooms required and can start preparing all necessary information.
• **Agreed upon vendors:** Confirm which vendors have been solicited based on the confirmed scope of the project. The event organiser can therefore commission the vendors and they can start including them in the planning strategy. The contract or Service Level Agreement (SLA) can be prepared in order to get the ball rolling.

• **Agreed upon budget:** Before the event organiser can begin planning, allocating resources and committing them to the vendors, venues and speakers, the budget must be agreed upon and signed off. An agreement must be in place that tackles and addresses how increases/decreases in quantities and scope changes will be handled. The budget may change between this step and step 6 (approval stage gate). However no changes can be made after that point. Once it has been approved no changes can be allowed.

• **Agreed upon timing schedule and program:** The program and all setup, breakdown and operations schedules must be confirmed. For example, it must be agreed upon as to how many days will be allocated to setting up and breaking down the venue. If the event organiser requires 3 days set up and 1 day breakdown, the client cannot change this at the last minute to 2 days set up and same day breakdown as all arrangements and logistics would have been planned around having 3 days for set up. Contracts and agreements would already be in place with suppliers, the set up and break down days would have been paid for already etc.

The program for the event must also be concluded and decided. It is vital that this is confirmed before moving into Step 5 – Planning. Deadlines for tasks and milestones for certain activities must be confirmed between the client and the event organiser. This will ensure that the project stays on track and that targets are met.

• **Agreed upon administration:** The following must be confirmed – procurement management plan, stakeholder management plan, information management plan, time management plan, human resource management plan, quality management plan and lastly the cost management plan.

• **Agreed upon design:** The following must be confirmed – event design strategy, content design, catering design, invitation design, program design, environment design, entertainment design, production and technical design and promotions design.

• **Agreed upon marketing:** The following must be confirmed – event marketing strategy, invitation management, materials management, merchandise management, promotions management, public relations management and sponsorship management.

• **Agreed upon operations:** The following must be confirmed – how attendees, the brand, communications, content, décor and design, entertainment, housing, site, infrastructure, logistics, speakers, technical and production, catering and way finding will be managed.

• **Agreed upon risk management:** The following must be confirmed – how will risk be managed with regards to decisions that need to be made, compliance management, disaster management, legal management, health and safety management, security management and emergency management. It must be confirmed who will manage this process, how it will be managed etc.
• **Agreed upon concept:** The proposed theme, concept and message must be agreed to so that design planning can conclude. Include a copy of the proposed storyboard for the client to sign. This will have images, descriptions and visuals that will help the client understand the overall vision. This avoids confusion and design expectations not being met.
Step Five

Planning and Design Phase
COVERED IN THIS SECTION:

INTRODUCTION
ADOPTING AN EVENT PROCESS APPROACH
THE NINE STEPS TO EVENT MANAGEMENT FRAMEWORK
MANAGING FILING SYSTEMS
EVENT PLANS, CHECKLISTS AND TEMPLATES
ADMINISTRATION PLAN
  Procurement Management
  Stakeholder Management
  Information Management
  Time Management
  Human Resource Management
  Quality Management
  Cost Management
DESIGN STRATEGY
  Concept and Theme Design
  Environment Design
  Production Design
  Entertainment Design
  Catering Design
  Program Design
  Invitation Design
  Content Design
MARKETING STRATEGY
  Marketing Management
  Invitation Management
  Materials Management
  Merchandising Management
  Promotions Management
  Public Relations Management
OPERATIONS STRATEGY
  Attendee Management
  Brand Management
  Catering Management
  Communication Management
  Content Management
  Décor and Design Management
  Entertainment Management
  Housing Management
  Infrastructure Management
  Logistics Management
  Site Management
  Speaker Management
  Technical Production Management
  Way Finding Management
INTRODUCTION

Event and design planning is the process of managing the project. Event planning includes budgeting, establishing timelines, selecting and reserving the event sites, acquiring permits, planning food, coordinating transportation, developing a theme, arranging for activities, selecting speakers and keynotes, arranging for equipment and facilities, managing risk, and developing contingency plans.

The domains facet represents the overarching areas of activity or functions within events management. They illustrate the full scope of the responsibilities assigned to event organisers as well as categories suitable for an organisational structure or effective knowledge management. The areas that need to be managed in an event can be broken down into Administration, Design, Marketing, Operations and Risk (ADMOR).

The Administration Domain deals primarily with the proper allocation, direction, and control of the resources used in an event project. Since resources are finite by definition, it is imperative that they be acquired, developed, and utilized in the most efficient and effective manner to benefit the event project.

The Design Domain focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions. The elements developed within each functional area combine to create the event experience encounter that will either be enjoyed or endured.

The Marketing Domain addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. The nature of the event as an “experience” necessitates a thorough understanding of the unique buyer-seller relationship associated with this intangible product.

The Operations Domain concentrates on the people, products, equipment, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and manoeuvres associated with each. Impeccable coordination is required in order to manage this symphony (or cacophony) of logistical and functional requirements and expectations.

The Risk Domain deals with the protective obligations, opportunities, and legalities traditionally associated with any enterprise, including an event project. These areas are inextricably linked with every choice made and all activities conducted, and are increasingly mandated by stakeholders ranging from regulatory authorities to discriminating event consumers.
ADOPTING AN EVENT PROCESS APPROACH

The greatest companies in the world (Coca – Cola, Disney, Apple, McDonalds etc.) all have one thing in common...they have dynamic and efficient processes and systems in place. These processes guide everyone within the organisation. Most people intuitively understand a business process to be a procedure with the purpose of reaching a goal.

A business process or business method is a collection of related, structured activities or tasks that produce a specific service or product (serve a particular goal) for a particular customer or customers. It can often be visualised with a flowchart as a sequence of activities with interleaving decision points or with a Process Matrix as a sequence of activities with relevance rules based on data in the process. It implies a strong emphasis on how work is done within an organisation.

A process is thus a specific ordering of work activities across time and space, with a beginning and an end, and clearly defined inputs and outputs: a structure for action. Processes are the structure by which an organisation does what is necessary to produce value for its customers.

This definition contains certain characteristics a process must possess. These characteristics are achieved by a focus on the business logic of the process (how work is done), instead of taking a product perspective (what is done). It can be concluded that a process must have clearly defined boundaries, input and output, that it must consist of smaller parts, activities, which are ordered in time and space, that there must be a receiver of the process outcome- a customer - and that the transformation taking place within the process must add customer value.

Business processes are designed to be operated by one or more business functional units, and emphasise the importance of the “process chain” rather than the individual units.

It is vital that event organisers have event management processes and systems in place for the following reasons:

- It ensures that there are defined, distinct procedures that everyone with the events department can follow.
- It ensures that no one person holds all the critical information about the event. Rather information is shared amongst all the stakeholders so that should the event organiser fall ill the day of the event, there are at least a hand full of other people who know what needs to be done.
- It ensures nothing falls through the cracks when planning.
- It ensures ongoing consistency as events will follow a framework/blueprint that will always remain the same (refer to the 9 Steps to Managing Events Diagram).
- It provides a framework from which new event staff members can be trained.
- It creates a method for how events must be run within the department/organisation.
- It helps the event organiser get organised and organise their thoughts.
EVENT PROCESSES

Being organised saves time and money. Being unorganised is a magnet for all kinds of problems. Being diligent in the details and ensuring that throughout the planning, preparation and deployment stage that you are on top of the details and constantly updating changes as they occur – will ensure the events success.

Make use of all the checklists, tables and diagrams supplied in this book. These will assist you with keeping track of what has happened; where you are going and what still needs to be done.

Keeping track of all the details of an event can be a daunting task. However, the more organised you are, the better you will become. Organisation can mean different things to everyone. “An organised mess” is, after all, a famous cliché. But in the event planning world, being organised will either make or break the event.

The following event processes have been created by the author of this book so that event organisers can simply implement them without having to recreate the wheel. These processes are tried and tested, are easy to understand and simple to use. These will be discussed in more detail below.

9 STEPS TO EVENT MANAGEMENT FRAMEWORK

This has already been discussed in previous chapters. These steps will guide the event organiser through the process. Ensure everyone within the events department follows this method.

MANAGING FILING SYSTEMS

The event organisers system of organisation can be just as personal as the events they plan. Tailor a method of organising to how you work. The steps you take to manage your events will set the tone in your career for years to come.

File Cabinet: The first step to becoming organised is purchasing a file cabinet. This is perfect for organising paperwork. You can file everything according to your CCCVVS.

Lever Arch Files: These can be divided with sections into CCCVVS for easy access. Therefore any documents that relate to The Client will be placed in The Client section.

Email Filing Systems: File your emails in your inbox folders in the same way using CCCVVS under the event heading name.

Calendars: Make use of outlook calendars to track and manage upcoming events. Also set reminders for items to indicate when deposits need to paid and when numbers need to be confirmed with venues etc.
Remember to keep copies of everything that you have on your computer as a backup.

Don’t reinvent the wheel. While you want to make choices that are specific to your event that will create a unique experience, take advantage of information that is already out there. Make use of the templates and samples supplied by the author.

Also remember not to overlook the obvious. Keep a clear head and think through all the administration and planning steps. The key to great events comes down to planning and the use of running scripts and templates.

**EVENT PLANS, CHECKLISTS AND TEMPLATES**

The key to event planning is in having comprehensive checklists and strategies in place that the organiser can use every time they run events. This minimises the time spend recreating templates, and it ensures that every aspect is covered.

**All these templates can be purchased in open format in word and in excel. Email enquiry@thehedgehogevent.com for more information.** The event organiser can adopt the following processes to assist in organising the event information.

**General Checklists and Templates**

- The client interview form.
- Task tracker.
- Contact list.
- Budget template.
- Event executive summary template.
- Closure report and checklist.

**Administration Strategy + Checklists**

*These include both the plan/ strategy that the event organiser needs to follow, as well as being a checklist.

- Procurement management plan.
- Stakeholder management plan.
- Stakeholder organogram.
- Information management plan.
- Time management plan.
- Human resource plan.
- RACI Matrix.
- Quality management plan.
- Cost management plan.

**Event Design Strategy + Checklists**

- Concept and theme checklist.
- Catering design checklist.
Content design checklist.
Invitation design checklist.
Program design checklist.
Environment design checklist.
Entertainment design checklist.
Production and technical design checklist.

Marketing Strategy + Checklists
Marketing management checklist.
Invitation management checklist.
RSVP schedule.
Materials management checklist.
Merchandise management checklist.
Promotions management checklist.
Public relations management checklist.
Sponsorship management checklist.

Operations Strategy + Checklist
Catering matrix.
Accommodation matrix.
Flight and transport matrix.
Site and housing matrix.
AV cue sheet.
Event operations executive summary.
Set up and strike schedule.
To do list.
Program.
Attendee management checklist.
Brand management checklist.
Catering management checklist.
Communication management checklist.
Content management checklist.
Décor and design management checklist.
Entertainment management checklist.
Housing management checklist.
Infrastructure management checklist.
Logistics management checklist.
Site management checklist.
Speaker management checklist.
Technical and production management checklist.
Way finding management checklist.
Risk Strategy + Checklists

Risk management checklist.
Risk assessment checklist.
Risk assessment form.
Decision management checklist.
Compliance management checklist.
Disaster management checklist.
Legal management checklist.
Health and safety management checklist.
Security management checklist.
Emergency management checklist.
Insurance management checklist.
ADMINISTRATION PLAN

Covered in this section:
- Procurement Management Plan
- Stakeholder Management Plan
- Information Management Plan
- Time Management Plan
- Human Resource Management Plan
- Quality Management Plan
- Cost Management Plan
PROCUREMENT MANAGEMENT

Most projects work within a customer/supplier environment. Generally the project team are working on behalf of the customer, and suppliers are responsible for the creation of the project deliverables/products — there can be both internal suppliers and external suppliers.

*Project procurement* is used when it is necessary to purchase or acquire products, services, or results needed from outside the project team. This knowledge area includes contract management and change control. Activities in these knowledge areas will include working with suppliers, vendors, contractors, service groups, etc.

PROCUREMENT MANAGEMENT CHECKLIST

- Purchase order number.
- Assess procurement management process.
- Client's preferred supplier's process.
- Procurement planning.
- Solicitation planning.
- Research preferred suppliers.
- Awarding source tender/job.

STAKEHOLDER MANAGEMENT

*Stakeholder management* is a critical component to the successful delivery of any project, programme or activity. A stakeholder is any individual, group or organisation that can affect, be affected by, or perceived itself to be affected by a programme. Effective stakeholder management creates positive relationships with stakeholders through the appropriate management of their expectations and agreed objectives. Stakeholder management is a process and control that must be planned and guided by underlying principles.

STAKEHOLDER MANAGEMENT CHECKLIST

1. DISCOVERY
   *See CIF
   Identify who stakeholders and committees are and what their roles and responsibilities are for the project.

2. RESEARCH STAKEHOLDERS
   Pre - select internal project team.
   Source/pre - select vendor.
   Source/pre - select venue.
   Pre - select speakers.

3. PROPOSAL
4. CONFIRMED IDENTIFIED STAKEHOLDERS BY CLIENT
Present proposed project team.
Present proposed vendors.
Present proposed venue.
Present proposed speakers.

5. STAKEHOLDERS PLAN
Compile stakeholder strategy outlining areas of responsibility and accountability.
Stakeholders areas of responsibility and accountability.

6. APPROVED STAKEHOLDERS STAGE GATE BY CLIENT
Client to confirm stakeholder strategy.
Stakeholders confirmation of responsibility and accountability.

7. STAKEHOLDER MANAGEMENT
Managing stakeholders (CCCVVS) roles and responsibilities.

8. STAKEHOLDERS EXECUTION
Management of stakeholders on day of event.
Ensure you execute the strategy by managing stakeholders.
Who will manage stakeholders?

9. CLOSURE
Evaluation of stakeholder performance.

**INFORMATION MANAGEMENT (IM)**

*Information management (IM)* is the collection and management of information from one or more sources and the distribution of that information to one or more audiences. This sometimes involves those who have a stake in, or a right to that information. Management means the organisation of and control over the structure, processing and delivery of information.

Information Management includes acquiring information from various sources and then organizing, retrieving and maintaining that information. For small size events, you can do information management all by yourself. However for big and very big events you will need an information manager. This information manager may have several assistants depending upon the size of the event.

An information manager is responsible for maintaining database of service providers (like decorators, technicians, DJ, anchor, florist, artists, ushers etc), guests, sponsors, partners, organizers, delegates, speakers, media people, clients and target audience.
The information which is usually managed is the contact details and all the business operations and monetary transactions carried out pre-event, at-event and post event. For e.g. when you hired a particular DJ, how much he asked for his service, how much advance you paid, what were the terms and condition on which there was mutual agreement and things like this.

Paperwork, and the information included is a crucial component of event management. The event organiser will amass tremendous amounts of information through the event process, and without organising and handling that information appropriately, one will not be able to utilise that wealth of data to achieve the goals and objectives of the event. The management of information is vital to acquiring the knowledge required to manage the event. Having an information or knowledge management process will allow the event organiser to transfer information effectively to the project team. Sound administrative procedures, database maintenance, and other record keeping activities must be integrated throughout the event.

An information manager is responsible for documenting all such activities. In case of meetings and conferences, he is the one who records the proceedings. He also formulates, prepares and implements the risk management plan i.e. risks related to information management like loss of data due to data theft or hard disk crash.

The information collected must be assessed, organised and controlled. Having processes and systems in place as discussed in previous chapters, will assist the event organiser in managing this process. It imperative that the event organiser have a “paper trail” of everything connected to the event.

PROTECING INFORMATION

Information is power. It is the event organisers responsibility to protect certain types of information. They must consider the safety and security of all information. Important documents and records including confidential information records should be stored in security protected files or if physical records – place in lockable filing cabinets. It is also important to notify all the stakeholders that all information shared about the event is confidential. A confidentially agreement can be put in place or a clause can be added to contracts.

INFORMATION MANAGEMENT CHECKLIST

1. DISCOVERY
Identify im requirements:
- Types of information to be managed e.g. Electronic, physical information.
- Data, record and document management.
- Document versioning guideline.
- Classification and naming guideline.
- Storage medium.
- Access and security.
- Knowledge management strategy and tools.
- Collection method.
Creation.
Receipt.
Identify capturing process.
Identify use and dissemination.
Maintenance.
Identify existing disposal.
Identify im personnel.
Legislative considerations.
Information reporting.
IM costing.
IM timing.
IM technology.

2. RESEARCH THE FOLLOWING:
   Research and develop im strategy.
   Data, record and document process.
   Document versioning process.
   Classification and naming process.
   Storage medium process.
   Access and security process.
   Disposal process.
   Research and develop knowledge management strategy and tools.
   Research im personnel/processes.
   Research legislation.
   Research information reporting structure.
   Prepare initial costing.
   Prepare initial timing.

3. PROPOSED IM PLAN

4. CONFIRMATION OF IM PLAN BY CLIENT
   Confirmed preliminary IM strategy.
   Confirmed preliminary knowledge management plan.
   Confirmed IM personnel.
   Confirmation of legislative management process.
   Confirmation of preliminary information reporting structure.
   Confirmed preliminary costing.
   Confirmed preliminary timing.
   Confirmed preliminary im technology.

5. IM PLAN
   Integrating im plan, im personnel into scope plan.
   Information reporting structure integrated into event decision tree/organogram.
   IM timing.
   Distribution of scope document.
   Creation of tools.
   Outline im technologies.

6. APPROVED IM PLAN BY CLIENT
   Approval of IM plan.
   Approval of knowledge management plan.
   Approved IM personnel.
   Approved reporting structure.
   Approved costing.
Approved timing.
Approved IM technologies.

7. IMPLEMENT + CONTROL IM PLAN
   - Ensure knowledge management strategy and tools in place.
   - Collecting information, capturing, receipt, and distribution of information to all stakeholders.
   - Ensure all information sent prior to event.
   - Ensure you get receipt of acknowledgement from stakeholders confirming they received the information.
   - Implementation of IM technologies.

8. @ THE EVENT
   - How will process be managed at event?
   - How will you manage updates on site?
   - Redistribution of information.
   - Who will manage this process?

9. CLOSURE
   - Evaluate IM performance.

TIME MANAGEMENT

OVERVIEW

**Time management** is the knowledge area that includes estimating task schedules, determining the project schedule and project completion date. It will also include monitoring and controlling a project schedule throughout the project. It is closely aligned with Project Cost Management, in particular with the Estimate Activity Resources and the Estimate Activity Durations, since it is these along with their cost implications that must be finalised before the schedule can be developed.

This knowledge area contains:
- Define activities.
- Sequence activities.
- Estimate activity.
- Resources estimate.
- Activity durations.
- Develop schedule.
- Control schedule.

Projects, especially projects that are running behind schedule, fail at the beginning, not the end. The importance of planning a project is never as evident until the rush to completion. The final actions to complete a project are dependent on the plans and motivations set in the project planning processes. Effective project management requires adequate time for planning—and based on the results of planning, adequate time for implementation of those plans.
Projects are temporary undertakings to create a unique product or service. The idea of time is inherent to the very definition of a project in that all projects are temporary. Projects may seem to last forever, but sooner or later they must end. Adequate planning of the temporary project can predict when a project will end. Within this short, limited time, the project manager must create something: a product or a service. The creation is about change—and change, as you may have guessed, takes time.

Creation of the product or service comes about due to the work the project team completes. The sum of the time of the work equates to when the project is completed. In addition to the duration of activities, there are other factors of time to consider:

- Project management activities.
- Planning processes.
- The sequence of activities.
- Procurement.
- Reliance on internal and external events.
- Known and unknown events affecting the project.

Project time management is based predominantly on planning, and then it’s all control and execution. Planning for project schedules may stem from deadlines, customer demands, hard and soft logic, and a bit of prediction.

CONSIDERING THE INPUTS TO ACTIVITY DEFINITION

The activity list is an output of activity definition, and includes all of the activities to be performed within the project. The list must be in alignment with the project scope. Remember the project scope? It’s a description of all the required work, and only the required work, to complete the project. In a sense, the activity list is a further definition of the project scope since it includes only those actions needed to complete the project scope.

Creating the activity list relies on several completed documents, knowledge, and actions. The creation of the activity list uses the following as inputs to the process:

- **Work Breakdown Structure**: WBS The WBS serves as a major input in the creation of the activity list. WBS is a deliverables-orientated collection of project components. It is not a collection of activities to create the deliverables.
- **Scope Statement**: It is a description of the required work, and only the required work, to complete the project.
- **Historical information**: If the project’s been done before, what activities were included in the similar project? Historical information is proven information that the project manager can rely on for creating activity lists.
- **Constraints**: What restrictions are imposed on the project manager and the project team? For example, is there a deadline for the project? A predetermined budget? Demanded quality metrics?
- **Assumptions**: What assumptions have been identified for the project work? For example, consider the availability of resources, acceptable weather, and time allotments to complete the project.

- **Expert Judgment**: Expert judgment allows experts to influence decisions in regard to the needed work packages.

---

**Figure 20: Time Management Inputs Process**

- **Scope and Strategy**: There must be clear understanding within the event team and amongst other stakeholders as to what is required to offer a successful event.

- **Activity Definition**: The specific activities that need to be completed to produce the project deliverables must be identified.

- **Activity Sequencing**: Some activities are dependent on each other. These need to be identified early. (E.g. one activity may not be able to proceed before another has not been completed).

- **Estimate Activity Duration**: Estimate the amount of time it will take to complete the various activities. You can indicate them in hours or days.

- **Schedule Development**: Analyse activity sequences, durations and resource requirements to create the event schedule.

- **Resource Planning**: Determine which resources (people, equipment and material) you will require to complete the tasks. Also estimate the amount/number of resources that will be required for this purpose.

- **Cost Estimating**: Develop an approximate costing according to the resources assigned to each task. What the event organiser needs to know is: How much will the event cost?

- **Event Plan Development**: Take the results of all the planning processes and put it into a consistent and coherent document.

- **Project Planning**: Is part of project management, which relates to the use of schedules such as Gantt charts to plan and subsequently report progress within the project environment.

Initially, the project scope is defined and the appropriate methods for completing the project are determined. Following this step, the durations for the various tasks necessary to complete the work/event are listed and grouped into a work breakdown structure. The logical dependencies
between tasks are defined using an activity network diagram that enables identification of the critical path. Then the necessary resources can be estimated and costs for each activity can be allocated to each resource, giving the total project cost.

At this stage, the project plan may be optimised to achieve the appropriate balance between resource usage and project duration to comply with the project objectives. Once established and agreed, the plan becomes what is known as the baseline. Progress will be measured against the baseline throughout the life of the project/event.

In order to create a plan of action, use some project management tools such as:
- Work Breakdown Structure.
- Activity Network Diagram.
- Critical Path.
- Gantt Chart.
- Resources.

**CREATING A WORK BREAKDOWN STRUCTURE**

Once the event has been defined - at least in draft form - the next stage is to analyse the work involved in the event planning and implementation. A **work breakdown structure (WBS)** in project management and systems engineering, is a tool used to define and group a project’s discrete work elements in a way that helps organise and define the total work scope of the project.

The Work Breakdown Structure (WBS) is a tree structure, which shows a subdivision of effort required to achieve an objective; for example a program, event, contract and/or project. In a project or event, the WBS is developed by starting with the end objective and successively subdividing it into manageable components in terms of size, duration, and responsibility (e.g., systems, subsystems, components, tasks, subtasks, and work packages) which include all steps necessary to achieve the objective.

A work breakdown structure element may be a product, data, a service or any combination. It also provides the necessary framework for detailed cost estimating and control along with providing guidance for schedule development and control. Additionally the WBS is a dynamic tool and can be revised and updated as needed by the project/event manager.

The Work Breakdown Structure provides a common framework for the natural development of the overall planning and control of an event and is the basis for dividing work into definable increments from which the statement of work can be developed and technical, schedule, cost, and labour hour reporting can be established. It permits summing of subordinate costs for tasks, materials, etc., into their successively higher level “parent” tasks, materials, etc. For each element of the work breakdown structure, a description of the task to be performed is generated.
The WBS is organised around the primary products of the project (or planned outcomes) instead of the work needed to produce the products (planned actions). Since the planned outcomes are the desired ends of the project, they form a relatively stable set of categories in which the costs of the planned actions needed to achieve them can be collected.

A well-designed WBS makes it easy to assign each project activity to one and only one terminal element of the WBS. In addition to its function in cost accounting, the WBS also helps map requirements from one level of system specification to another, for example a requirements cross reference matrix mapping functional requirements to high level or low level design documents.

For example an activity at a conference would be securing speakers for the event. The following diagram shows an actual example of the WBS.

This enables the scope of the event to be outlined with the client. In this way they can clearly outline “who does what” when the event planning begins etc. An important aspect of scoping is to know the limitation of the work required. In other words identify what does NOT have to be done. It may not be enough detail to indicate the necessary tasks and to ensure that they are properly assigned. The next step is to expand on each of these elements. The work area of “Speakers” is shown as an example of the next level.
The following diagram gives an indication of the third level of the task analysis for only one task of the second level (Decide on Speaker Topics). It is further broken down into separate tasks.

These tasks can form line items in a budget, allowing costing to become much easier. By adding the costs for the different activities, the event organiser can calculate the cost for the event. The Work Breakdown Structure (WBS) will provide the basic graphical representation for the event project management team. Staff and other stakeholders will easily understand it and quick reference can be made to any aspect/activity of the event.

The WBS:
- Defines the total scope of the event.
- Organises the work to be done into manageable portions.
• The base from which planning is performed.
• The base for establishing cost & budget.
• Links objectives to resources.
• Is a communication tool for the event coordination team to develop or confirm a common understanding of the scope of the event.
• Displays deliverables to be produced.

Rules in developing a WBS:
• **Headings** must be accompanied with activities.
• **Tasks** or activities must include an action word and noun statements.
• Written in **present** tense.
• No activity must be **overlooked**.
• During the WBS process the following **questions** are asked:
  - *What else is needed?*
  - *What is next?*

**The work breakdown structure** is the method through which the work to be executed, is classified in a hierarchical structure, moving into more detail with each level of breakdown. A work breakdown structure will group event elements and organise and define the total scope of the project or event.

![WBS Level diagram]

The same event with more levels in the Work Breakdown Structure:
SCHEDULING THE EVENT

- **Task Dependencies**: Once tasks have been identified, place them in chronological order. Depending on the available resources some tasks can be done simultaneously. For example, the advertising of an event can be done at the same time as the contracting of caterers - provided both that the same person is not required to perform both tasks. There may be, however, other tasks that need to be completed before others can start. For example: Advertising the event can only proceed after a suitable venue has been selected.

Tasks can be divided into:

- **Parallel Tasks**: These tasks can be performed simultaneously and are not dependent on one another, i.e. the one does not need to be completed for the other to proceed. Parallel tasks may use different resources and have different pre-conditions.

- **Serial Tasks**: These tasks need to be performed in a specific sequence or chronological order due to resource availability or necessary pre-conditions. They are dependent on one another and a specific task may require another to be completed, i.e. one can only select a suitable menu once you have identified the dietary requirements of attendees.

In order to sort tasks, determine predecessors (identify those tasks that should be completed first in order to proceed to the other tasks). Consider which tasks must be completed before one can start with this specific task? If there are none, it can be seen as a parallel task. If the event organiser identifies tasks that must be completed before they can proceed with this task, it is a serial task.

Sorting all the tasks involved in a complex event can be a time consuming exercise. For smaller events use sticky notes or note cards – one for each task. Paste them on a large board and
rearrange them until you find the most efficient sequence. Should the corporate client decide to change his/her mind over something, this method deals with changes quickly.

There are a number of activities that are performed by an event organiser. At the start of the project there are a number of tasks involved in proposal preparation - or obtaining the work. If successful in getting the event, the event organiser continues with the planning and preparation for the event.

It is crucial that the event organiser apply control to monitor whether everything is going according to plan and/or to deal with problems and changes. Before the event, monitor the progress again and make any last minute alterations. During the event the event organiser should not have much to worry about or a lot to do besides overseeing the production. During event shut down, the event manager’s controlling and responding skills need to be applied.

**MILESTONES AND TIME-LINES**

Within the framework of project management, a **milestone** is the end of a stage that marks the completion of a work package or phase, typically marked by a high level event such as completion, endorsement or signing of a deliverable, document or a very important meeting.

*A milestone* is a significant event in the project, usually completion of a major deliverable. A milestone, by definition, has duration of zero and no effort. Milestones are essential to manage and control a project, but there is no task associated with it (although preparing a milestone can involve significant work). A milestone can be used as a project checkpoint to validate how a project is progressing and revalidate the work. In addition to signaling the completion of a key deliverable, a milestone may also signify an important decision or the derivation of a critical piece of information, which outlines or affects the future of a project. In this sense, a milestone not only signifies progress already made but also indicates the direction you need to take next. Decisions made at milestones may alter the route through the project plan.

Milestones can add significant value to project scheduling. When combined with a sophisticated scheduling methodology such as Program Evaluation and Review Technique (PERT) or the Critical Path Method (CPM), milestones allow project management to much more accurately determine whether or not the project is on schedule. By constraining the dates associated with milestones, the critical path can be determined for major schedule intervals in addition to the entire project. Slack/float can also be calculated on each schedule interval. This segmentation of the project schedule into intervals allows earlier indication of schedule problems and a better view into the activities whose completion is critical.

Milestones are frequently used to monitor progress, but there are limitations to their effectiveness. They usually show progress only on the critical path, and ignore non-critical activities. It is not uncommon for resources to be moved from non-critical activities to critical activities to ensure that milestones are met. This gives the impression that the project is on schedule when actually some activities are being neglected.
A **timeline** can be a useful way to visualize changes or events that occur over periods of time. Although there may be better tools for creating timelines, Excel can be handy, particularly when the event organiser needs to perform date calculations, or take advantage of the drawing tools within Excel.

Estimate the timeline for each task. This can be done by asking how long each task will take to complete when the event organiser has the correct resources and pre-conditions. This is often called the Estimated Completion Time (ECT). Estimating the duration correctly may not always be possible and may rely a lot on guesswork.

In project management there are four estimated values:

- **Earliest Start (ES)** - the earliest date/time a task can start after its immediate predecessor task has finished.
- **Earliest Finish (EF)** - the earliest date/time it is finished thus EF = ES + ECT.
- **Latest Start (LS)** - the latest date/time it can start without affecting the date of the event.
- **Latest Finish (LF)** - latest date/time it can finish without affecting the date of the event.

The LF and LS are critical to event planning as it is rare that the event date will change. "*When will it be completed?*" is a common saying by every event manager and the answer becomes more critical the closer to the day of the event.

### CREATING A NETWORK DIAGRAM

Network Analysis and Gantt Charts are two project management tools that aid in carrying out tasks against a time tangent. In a project, networks form the basis for controlling the project. While the WBS forms the backbone of the project tasks and deliverables, the scheduled time for each task to take place is demonstrated by a network diagram.

In a network diagram, each activity has a fixed start time and a fixed finish. Dependencies of tasks are determined by the time allotted for each, where one might start only when a particular task is finished or may start simultaneously alongside another.

There are four logical dependencies that are followed in a network diagram.

- **Finish - Start** (One activity has to finish before the next activity starts. E.g. Draw a bath. Bath.)
- **Start – Start** (One activity has to start before the next activity starts. E.g. The guest must begin eating his lunch before the host starts eating his lunch).
- **Start – Finish** (One activity must start before the next can finish. E.g. Security measures will have to start prior to VIPS setting out for the function).
- **Finish – Finish** (One activity has to complete before the next one finishes. E.g. Security checks will have to be completed before the VIPS cars arrive).
To specify predecessors and successors on a given list of event activities is the first step to creating a Network Diagram. In this step, the project activity dependencies are identified. The Network Diagram needs to clearly illustrate these dependencies.

Objectives of a Network Chart:
- Links event activities sequentially.
- Identifies critical path for event / project.
- Identifies event task dependencies.
- Can be used for ‘what-if’ and forward or backward scheduling purposes.

Guidelines:
- The first activity will be the “START” task in the network.
- To sequence the project activities, ask the following question:
  - “Which task must be completed before one can start…?”

While creating a list of project activities, you need to ask yourself the following questions:
- What project activities happen before the activity being examined?
- What project activities can happen at the same time with this activity?
- What project activities happen after this activity?

For example, if the event organiser was booking the venue the following activity list would be defined:

| Identify venue options.                             |
| Call venues and ask for relevant information, floor plans, specs, quotation etc. |
| Conduct site visit and check requirements are met. |
| Select venues for site visit and provisionally book. |
| Book site visit.                                    |
| If requirements met, request contract, terms and conditions, book. |
| Sign contracts.                                     |
| Make payment.                                       |
| Identify venue requirements and needs.              |
| Review the information received from the venue.     |

Using the example above activity ask the three questions listed below:
- **What project activities happen before the activities being examined?** Some activities that may occur before the “Provisional Booking” activity include: Identify venue requirements and needs, identify venue options, call venues and ask for relevant information, floor plans, specs, quotation etc., and review the information received from the venue.

- **What project activities can happen at the same time with this activity?** Some activities that may occur at the same time as “Conducting the Site Visit” activity include: Requesting contracts, terms and conditions and booking, and signing contracts.
• **What project activities happen after this activity?** Some activities that may occur after the “Identifying Venue Requirements and Needs” activity include: Selecting a venue, booking a site visit and making payment.

Arrange these activities in the order in which they should be executed.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify venue requirements and needs.</td>
<td>1</td>
</tr>
<tr>
<td>Identify venue options.</td>
<td>2</td>
</tr>
<tr>
<td>Call venues and ask for relevant information, floor plans, specs, quotation etc.</td>
<td>3</td>
</tr>
<tr>
<td>Review the information received from the venue.</td>
<td>4</td>
</tr>
<tr>
<td>Select venues for site visit and provisionally book.</td>
<td>5</td>
</tr>
<tr>
<td>Book site visit.</td>
<td>6</td>
</tr>
<tr>
<td>Conduct site visit and check requirements are met.</td>
<td>7</td>
</tr>
<tr>
<td>If requirements met, request contract, terms and conditions, book.</td>
<td>8</td>
</tr>
<tr>
<td>Sign contracts.</td>
<td>9</td>
</tr>
<tr>
<td>Make payment.</td>
<td>10</td>
</tr>
</tbody>
</table>

From the answers, the following activities have determined predecessors and successors. Similarly, examine each project activity and develop relationships between each one. The event organiser will then have a table of project activities, which also contain information about predecessors and successors.

The activity list would contain the entire scope. Generally, the scope of work that needs to be completed is broken into more manageable phases.

After creating the table, proceed to constructing the Network Diagram. Refer to the table, while creating the network diagram.
In a complex project, you will probably not create the Network Diagram manually as done above in this example. More than likely software, such as MS Project, will be used to create the Network Diagram. However, even in the software, the event organiser will need to manually enter the project activities list and the dependencies between them. This software will consist of a range of other useful features, like automatically creating the critical path and a Gantt chart.

Network Diagrams have the following advantages:

- Optimizes and increases efficiency of stakeholders and tasks designated to each.
- Reduces the overall project duration by managing parallel tasks.
- Since it controls all activities of a project as a whole, the success of a project can be guaranteed.
- Drawing up network diagrams help in identifying all possible tasks that can be undertaken in a project.

**FINDING THE CRITICAL PATH**

After creating a Network Diagram, the event organiser will need to use the Critical Path Method (CPM) to determine:

- The critical path diagram (project activities that can cause delay): The longest path in a network which has no room for float or delay and is critical to the efficiency of the project’s time schedules.
- The float for each activity: An approved delay of time which does not affect the overall project duration.
- The optimal project activity flow.
- Create a schedule.

The chain of activities where the earliest and the latest times coincide showing a zero float - extra time where there are no activities planned. It also shows the completion of the project/event in the earliest possible time the critical path.

- Slippage of any task on the critical path will cause a corresponding slippage in the end-date.
- The events on this path are usually “most important” or critical.

**The Critical Path:** It is the path with no float (no extra time where there are no activities planned). It is the longest path through the network. It determines the shortest time in which the project end-result can be achieved.

To reduce the project duration, the duration of the critical activities must be reduced. All the activities on the Critical path must be completed in order for the project to achieve its end-result according to predetermined time, cost and performance standards.

The event organiser must be able to recognise priority in a list of tasks in order to give the correct attention to each. The sequence of tasks that have no buffer time is the critical path. The tasks that fall within the critical path must be completed on time – even if it means obtaining additional
resources. For example, delivery and set-up of Audio Visual, staging and production equipment at an event is seen as a critical task. Many of the other tasks cannot proceed unless this is done. Once it is set up the décor company can drape, followed by the venue setting up tables and chairs.

A critical path is useful in determining the overall duration of the event and identifying activities which need to completed if the planned schedule is to be met.

In order to develop a critical path:
1. List the tasks to be completed and estimated duration of each.
2. Determine the earliest starting date for each activity.
3. Determine the earliest finishing time for each task.
4. Determine the latest finishing time for each task.
5. Calculate the float (margin for variation) for each task (the difference between the latest finishing date and the soonest starting date). Total float = date of the latest finish minus date of the earliest start minus duration. The tasks with zero float are on the critical path. If the earliest starting and the latest starting dates are exactly the same, the earliest finishing and the latest finishing dates will also be the same. The activity must therefore be done between those dates or the entire event schedule will be inaccurate.
6. Start with the tasks on the critical path that have no leeway (float) and work the rest of the schedule from there. Re-assign items according to the margin for variation available to ensure that every resource is fully utilised and no one is overloaded.

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
<th>Earliest Start</th>
<th>Earliest Finish</th>
<th>Latest Start</th>
<th>Latest Finish</th>
<th>Total Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a suitable venue</td>
<td>5 days</td>
<td>3 March</td>
<td>8 March</td>
<td>8 March</td>
<td>8 March</td>
<td>0</td>
</tr>
<tr>
<td>Design invitations</td>
<td>3 days</td>
<td>4 March</td>
<td>6 March</td>
<td>7 March</td>
<td>12 March</td>
<td>5</td>
</tr>
<tr>
<td>Distribute invitations</td>
<td>3 days</td>
<td>12 March</td>
<td>13 March</td>
<td>14 March</td>
<td>21 March</td>
<td>1</td>
</tr>
<tr>
<td>Select a caterer</td>
<td>2 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choose a menu</td>
<td>1 day</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan the event</td>
<td>5 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choose performers</td>
<td>3 days</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In a simple network it is easy to determine how long it will take to complete a project or event. The duration of each activity is usually written in each activity box.
First, notice that there are three PATHS in this network. A PATH is a sequential string of activities from project beginning to project end. The three paths are A-B-C-F-G, A-B-D-F-G, and A-B-E-F-G.

It can be determine how long it would take to complete a sequence of activities along a path by adding up the durations of each activity on the path. So path A-B-C-F-G will take \((2+4+1+2+3 = 12)\) 12 days to complete.

All three paths have to be completed to finish the project. However, it is the longest path that will determine how long it will take to complete the overall project, which is A-B-E-F-G \((2+4+5+2+3 = 16)\) that will take 16 days to complete.

The longest path is called the CRITICAL PATH. The longest path through the network is called the Critical Path because any delays to the activities on that path will delay the overall completion of the project.

**GANTT CHARTS**

A Gantt chart, commonly used in project management, is one of the most popular and useful ways of showing activities (tasks or events) displayed against time. On the left of the chart is a list of the activities and along the top is a suitable time scale. Each activity is represented by a bar; the position and length of the bar reflects the start date, duration and end date of the activity.

This allows you to see at a glance:
- What the various activities are.
- When each activity begins and ends.
- How long each activity is scheduled to last.
- Where activities overlap with other activities, and by how much.
- The start and end date of the whole project.

To summarise, a Gantt chart shows you what has to be done (the activities) and when (the schedule).

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Q1 2009</th>
<th>Q2 2009</th>
<th>Q3 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dec '08</td>
<td>Jan '09</td>
<td>Feb '09</td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Follow up</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TIME MANAGEMENT PLAN CHECKLIST

1. DISCOVERY OF PROJECT DURATION
   - Estimated project time line.
   - Identify initial work breakdown structure.
   - Define activities.
   - Sequence activities.
   - Estimate activity.
   - Resources estimate.
   - Activity durations.
   - Develop schedule.
   - Control schedule.

2. RESEARCH AND DEVELOPMENT DURATION
   - Time frame required for r and d.
   - Activity sequencing.
   - Activity duration estimating.
   - Preliminary schedule development.
   - Duration to compile and deliver proposal.
   - Duration before final decision made (go/no go).
   *Insert timeline duration here broken down into all event steps.

3. PROPOSED TIME MANAGEMENT PLAN

4. CONFIRMATION OF TIME MANAGEMENT LINE BY CLIENT
   - Contract/ sign off duration.
   - Duration for contract and budget to be signed off.
   - Confirm times on program.
   - Confirm times for 8 steps.
   - Confirm milestones.
   - Duration for planning.
   - Activities.
   - Work Breakdown Structures.
   - Schedules.

5. PLANNING DURATION
   - Duration to compile scope document.
   - Activity sequencing.
   - Activity duration planning.
   - Schedule development.

6. ACTIVITY APPROVAL BY CLIENT
   - Activity definition approval.
   - Activity sequencing approval.
   - Activity duration approval.
   - Schedule approval.
   - Approved schedules.
   - Approved programs.
   - Approved event process duration.
7. TIME MANAGEMENT
   Duration to implement project.
   Ensuring deadlines, milestones reached.
   Manage and update task tracker daily.
   Use outlook to manage milestones.

8. @ THE EVENT
   Duration of actual event.
   Set up schedule.
   Management of activities.
   Management of program timings.
   Set up schedules.
   Breakdown schedules.
   Av cue sheets.
   Show calling.
   Registration.
   Who will manage this process?

9. CLOSURE
   Evaluation of all time management areas.

HUMAN RESOURCE MANAGEMENT

OVERVIEW

The human resource management knowledge area has to do with managing people. It includes aspects such as acquiring the team, developing the overall team performance, and then managing that performance such as performance appraisals, leading and coaching, and resolving resource issues and optimizing the project performance. The objective here is to ensure that all human resources are used effectively, and draws upon skills such as leadership, team building, and communication.

This knowledge area contains four processes:
- Develop human resource plan.
- Acquire project team.
- Develop project team.
- Manage project team.

STAFFING

Staffing for an event is as diverse as the event itself. Adequate staffing depends on the number of guests anticipated to attend the event, and are employed to handle the multiple tasks that undergird a successful event.
Staffing encompasses individuals such as servers, coat checkers, drivers, special needs assistants, valet parking attendants, customer information agents, and ticket-takers. Staffing may also attend to the details of directing the influx of guests, the positioning of booths and vendors, attending nurseries, assisting guest speakers, delivering supplies during the event, and containing litter.

Staff may also be required to oversee the direction of other staffers, or to handle the monies generated through ticket sales. Typically, many of these positions can be accomplished by event volunteers, filled by existing company employees, or may be included as services provided by the caterer, equipment rental service or event venue.

The roles of staff are reliant upon the event itself, and the variety of services needed to provide a pleasant experience for event guests. While event sponsors may envision a successful event, rarely do they comprehend the number of bodies required to handle all the details. Defining all facets of the event, from the arrival of guests to the after-party cleanup, will help to prevent those problems caused by the lack of adequate personnel.

Many services contracted for the event, such as caterers, chair and table rentals, florists, ticketing agents, and the event venue or location itself commonly provides personnel to handle their respective services. These may be included within the scope of contracted services, or be offered at an additional cost. Money can be saved with the designation of volunteers from company ranks, membership rosters, or interested individuals willing to perform these functions, provided direction is available to coordinate individuals to carry out assigned tasks. Often, it is to the benefit of event organisers to contract professionals offering such services, who likely provide adequate insurance and training to guarantee these functions are performed to event sponsors’ expectations.

**VOLUNTEER COORDINATION**

*Volunteers* are the lifeblood of many events. Without volunteers, these events would cease to exist. The profile of the volunteer has changed dramatically during the past two decades, and it is important that the Event organiser recognise this change. Effectively recruiting, training, coordinating, and rewarding volunteers is a vital part of many Event Management operations.

Volunteers may be used in all programs and activities of an organisation and serve at all levels of skills and decision – making. However, volunteers should not displace paid employees from their positions. Productive use of volunteers requires staff involvement in identifying productive and creative volunteer roles, recruiting suitable volunteers, and tracking and evaluating the contribution of the volunteers to the organisation.

Depending on the staff size and their involvement in the organisation’s meetings, there may be times when volunteers also supervise other volunteers. This should only be done if a supervising volunteer is under the direct supervision of a paid staff member.
CONTRACTING TEMPORARY EMPLOYEES

Temporary employees may have to be brought to assist with the event. This may mean that the person is recruited for the life cycle of the event. Once the event is over the employee’s contract is over. Temporary employees may be recruited from promotional companies, universities, colleges or event management companies. To reduce staff travel costs, organisations may hire local personnel to handle a number of non-site responsibilities. Local residents can be a valuable resource for assisting attendees with local information, directions etc.

It is important to consider the following questions when considering temporary personnel:
- Will temporary personnel be using computers on-site, will they have the basic computer skills necessary to perform the job?
- Are temporary personnel familiar with the conference program and the types attendees expected?

When choosing temporary event staff ensure the following:
1. Identify the position they will fill and be sure of the skills required.
2. Write a job description for the person so they understand what is expected of them.
3. Give them a copy of The Event Executive Summary (EES) so that they understand the scope of the event.
4. Brief them on how to liaise and interact with VIPS and clients.
5. Ensure that they are aware of any restrictions/confidentiality agreements or inappropriate behaviours that will not be condoned.

The trick here is to be very specific about what is required. It is vitally important to communicate as much as you can to the temporary worker so that they are able to assist guests, clients etc.

Brief the temporary worker thoroughly including information about:
1. The Event Executive Summary.
2. **Brief** regarding day of the event program
3. **Dress code:** What are they required to wear
4. **Food and beverages:** Where and when do they eat and drink
5. **Smoking:** Are they allowed to smoke? If so, where and when?
6. **Dealing with queries:** Give them scope with regards to what decisions if any they can make. Also give them a list of frequently asked questions and brief them on this
7. **Dealing with customers:** What is required?
8. **Dealing with clients:** Are they allowed to interact with the Client? If so what is the chain of command?
9. **Dealing with VIPS:** Are they allowed to interact with VIPS? Are they allowed to talk and have photos? Set specific guidelines.
10. **Risk, safety and security:** What are they to do in the case of an emergency? Ensure they know what is included in the evacuation plan and how to safely evacuate everyone out the building. Ensure that they know what security risks are and how to handle them and the chain of command.
Volunteers and temporary staff are part of your event project team so make sure they have as much information as the rest of the team. If required get them to sign confidentiality agreement to ensure that any information discussed remains private.

DEVELOPING POLICIES, PROCEDURES AND PRACTICES

Everyone benefits from well - written policies and procedures. First the internal stakeholders benefit from having clear processes through which to make decisions. Second, external stakeholders benefit from using a tool to help them understand, the organisation and the decision – making process of the event team. Finally the guests themselves benefit. Although they may never see a copy of the policies and procedures, in the event of a life – threatening emergency, thanks to this document, lives may be saved.

Policies are conceived and approved by the owner of the event. Procedures are the implementation tactics for policy. Policy may be broad, overarching rules of conduct, whereas procedures are the regulations that administrators or event organisers use to implement policy. Both policies and procedures are essential to produce and sustain successful events.

Organisational Chart and Chain of Command

It is important to have an organisational chart in place. This will assist any outside event management companies or vendors when working with your organisation. It will also ensure that there is clear understanding of the chain of command and who is responsible for what. There is always more than one department that will be part of the event so it is important to know the structure within the organisation.

An Organogram is a diagram that shows the structure of an organisation and the relationships between the different people, departments, and jobs at different levels within that organisation. It is a tool used for decision making capacity, reporting structure, responsibility and accountability throughout the project. This is a stakeholder management tool. Each supplier will provide the event organiser with a copy of their company organogram. This will then be integrated it into the event’s overall project organogram.
1. HR DISCOVERY

Identify staffing requirements:
- Client.
- Staff.
- Volunteers/interns.

Does the client have a preferred suppliers/vendors list? If so, what is the process that needs to be followed and who is the point of contact?
- Company’s HR.
- Vendor’s HR.
- Promo people required.

STAFF
- Host/Hostesses.
- Directions.
- Registration.
- Food and beverage (servers/clearers, bartender ratios).
- General maintenance (electrician, restroom attendant, etc.).
- Technical director (sound, lighting, etc.).
- Site manager (parking, grounds, tents).
- Security/loss prevention (ems, police, fire).
- Entertainment (dressing room attendant, runner).
- VIP coordinator.
Models, demonstrators.
Transportation lead.
Issues related to all staff.
Training/ pre-event and day of show briefings.
Uniforms appropriate/ name-tags and credentials.
Evaluation specific language needs/ sign language.
Check staff credentials.
Vendor staff management protocols.

2. RESEARCH AVAILABILITY OF HUMAN RESOURCES
Research HR practice. Get information on process, practices.
Availability of vendors.
HR contact person.

3. PROPOSED HUMAN RESOURCE MANAGEMENT PLAN

4. HUMAN RESOURCE CONFIRMATION BY CLIENT
Staff and vendor acquisition confirmation.
Confirm hr practices.
Confirm HR process to follow.
Confirm HR requirements.

5. HUMAN RESOURCE PLANNING
Organisational planning.
Organogram finalised.
Agreement on scope of project finalised.
Volunteers sourced, selected, confirmed, paid, finalised.
Hiring promotional crew.
Outsourced work to 3rd party: consider ramifications/risks.
Behaviour policies developed and finalised.
Contracts developed and completed.
Hiring strategies.
Performance measurement criteria.

6. APPROVAL OF HR PLAN BY CLIENT
Approve vendors.
Approve volunteers.
Agree on scope of project.
Agree on decision making tree.
Agree on timings.
Agree on costing.

7. HUMAN RESOURCE MANAGEMENT
Organisational management.
Behaviour policies distributed.
Training and briefings.
Strategy in place and completed.
Receipt of all policies by CCCVVS.
Event project planner distributed.
Who will manage staff?
Who will manage volunteers?
Who will manage company staff?
Who will manage vendor staff?

8. @ EVENT
Organisational management.
Who will manage this?

9. CLOSURE
Evaluation of HR plan.

QUALITY MANAGEMENT

The quality management knowledge area covers two main areas, creating the products to an acceptable quality level, and the quality of the project management process itself.

This uses three processes:
1. Plan quality.
2. Perform quality assurance.
3. Perform quality control.

Performing quality assurance is the act of auditing and comparing the quality requirements against the quality control measurements to check that appropriate quality standards and operational definitions are used.

QUALITY MANAGEMENT CHECKLIST

- Consider how quality will be managed throughout all steps?
- How will quality be confirmed/approved?
- Who will manage, approve and confirm the quality of all knowledge areas?
- When will quality be assessed?

For Example:
Design quality: Who will check the quality of the invitation and approve it? What quality standard is in place?
Costing quality: Who will check to see best pricing from suppliers? How will this be evaluated?
**COST MANAGEMENT**

**OVERVIEW**

*Cost management* is there to estimate the resources required, and the project budget. Resource costing is not just about people. It should also include other types of resource such as Materials, equipment, facilities, and project related services such as letting contracts.

This knowledge area has three processes:

- Estimate costs.
- Determine budget.
- Control costs.

There are two techniques used to determine options and optimize the process: Value engineering, and life-cycle costing. These will be discussed in detail in a later article.

*The budget* represents the action plan that each successful event organiser must carefully develop. Budget preparation is probably the most challenging part of the financial management since the entire preparation is usually based on limited information and assumptions. A budget is a financial plan and list of all planned projected expenses &/or income. It helps in the coordination of the event & defining scope.

To complete the budget preparation, come up with estimates based on assumptions. The event budget is the most important tool the event organiser will use to manage the financial decisions. Each event represents a separate budget. All individual budgets are combined into an annual budget.

Since different events are designed for different purposes, they may fall it to one of the following categories:

1. **Profit - orientated events.** In this type of event, revenue exceeds expenses. Typical examples are events produced by corporations for the purpose of generating new sales.
2. **Break – even events.** In this type of event, revenue is equal to expense. A good example is an association conference. In this case, event professionals should budget the event, keeping the break – event assumption in mind. Admission fees should be calculated at the rate that will cover all expenses and break event.
3. **Loss leaders or hosted events.** These events are designed from the beginning to lose money. A good example of such events is a university graduation or year-end staff function. These events are usually organised with the purpose of promoting a cause or agenda and not designed to break even or generate a profit.

Where events are concerned – the budget can be the one component that sends the project off course, mitigates its success, or stops it from taking flight to begin with. Budgets are necessary for events. They have plenty of purposes, the overriding one being that they will keep your event grounded in reality! We would all love to have a fantasy ‘unlimited’ budget scenario but that is not
realistic. In the realm of events, you’ll soon learn that unexpected costs arise – even when the budget’s being vigorously tracked. Without a budget tracker at the helm, line items can quickly spiral out of control.

Budgets are management tools and plans that involve and control and are indicators of performance. The budget is a financial plan expressed in monetary terms. It is plan for the future. It shows financial indicators of activities for the year and demonstrates the vision of the organisation and mobilise it in that direction. As events vary, so too will budget line items. What needs to be included in the budget? The answer is easy: everything.

Every item on a checklist or in the event strategy will have a potential financial impact. Therefore use the checklists, plans and strategies to ensure that all costs are considered.

Remember to look out for unforeseen items:

- Commission charges.
- Travel costs for vendors.
- Food and beverage costs for bus and shuttle drivers.
- Taxes and levies.
- Gratuities.
- Overtime charges.

**FINANCIAL HISTORY**

The best financial history is that which occurs over a three – year period. The event organiser must rely upon what is known at the time the budget is prepared or rely upon estimates. They will have to rely on events of similar size and scope to develop the budget because his or her event is a first – time venture and no history exists. The longer one is in the industry, the more accurate the estimates will be.

A good technique used for developing income projections is high – low. The logic is that an event organiser compares two scenarios: the best and the worst. Next, the manager decides whether the losses that may occur under the worst – case scenario are bearable and, if so, accepts the projects. If not, the project is refused.

The trick is to always keep an eye on costs and every year review your vendors and their costing. Try to pick three quotes but from different market segments. It does not help picking three of the most expensive suppliers. Ensure that the quotes received represent three varying price brackets. It is also important to negotiate with your vendors.

**DEVELOPING A COMPREHENSIVE BUDGET**

*A budget* is necessary for control purposes. It is a document that compares expected revenue with actual revenue, and expected expenses with actual expenses. This assists the event organiser to keep control of the event.
Budgets are management tools and plans that involve process and control, and are indicators of performance. The initial budget shows the results which may be expected, including the assumptions used in obtaining that budget. If the objectives are not met, the budget will need to be re–looked at and further calculations done until they are.

The key to great budgeting is the following:

1. Know what the budgeted amount is and what it includes and excludes.
2. To have great MS Excel spreadsheets set up.
3. To analyse the information on invoices from vendors to ensure all costs are accounted for.
4. Anticipation of unforeseens that vendors have not included.
   - Check to ensure that vendors have included set up and break down costs as well as insurances and compliance documentations.
5. Key an eye on expenses throughout the planning stage.
6. Use the checklist provided.
7. Accurately project audience numbers.
8. Negotiate block bookings with venues and buy in bulk.

<table>
<thead>
<tr>
<th>Standard Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per Person</td>
</tr>
<tr>
<td>Food expenses</td>
</tr>
<tr>
<td>ITEM</td>
</tr>
<tr>
<td>CLIENT</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Event Management</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Safety &amp; Security</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Travel &amp; Transport</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Venue</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Speakers</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Total Food</td>
</tr>
<tr>
<td>Total Variable</td>
</tr>
<tr>
<td>Total Variable</td>
</tr>
<tr>
<td>Total Variable</td>
</tr>
</tbody>
</table>

**Table 5: Standard Budget Template**

**STEPS TO DEVELOPING A BUDGET**

1. **Zero based or incremental:** Evaluate if you the budget is zero – based budget or incremental budget. A zero based budget a budget without the benefit of a previous year’s budget. It is not based on historical data. It a first time event. The event organiser starts from scratch and builds a budget from there.
An incremental budget is a budget where actual figures from previous year’s budget are known and available and the organiser would take this information using it as a framework and update increased figures.

2. **Fixed versus flexible budgets:**
Is budget flexible or developed according to a fixed budget?
Flexible budget: You propose line items. No fixed budget is given to you by client. They ask you to come up with an amount. Give client 3 options (Platinum, gold & silver).
Fixed budget: Client gives you a fixed amount within which to work. You cannot exceed this amount. Therefore limited.

3. **Understanding fixed and variable expenses:** Fixed expenses relate items that will not fluctuate based on quantities. For example the cost of venue hire is a fixed cost as it will be the same whether 100 people attend or 1000 people attend.

Variable expenses are more difficult to predict because, often, they are purchased at the last minute from vendors and the prices may fluctuate. These are also known as direct expenses which include audiovisual rentals, registration materials, printing, and other items with a total cost that is reliant on the final number ordered and your ability to negotiate a fair price. An example of a variable expense would be if the venue hire was fixed, the food and beverages for the guests would be variable. It will be dependent on the number of people confirmed. It can increase or decrease. However, pay close attention to contracts as some vendors, suppliers may lock or fix these numbers. For example most venues only allow a variation of 5 – 7 % on attendance numbers either up or down.

**Variable with a minimum:** This indicates items that vary in cost however there is a minimum booking requirement. For example, a venue room may accommodate a maximum number of 500 people. To book that room there might be a minimum booking requirement of 300. In other words if only 250 people attend the event the client will still be charged for 300 irrespectively. They will land up paying for 50 people that did not attend. By indicating this on the budget the event organiser makes the client aware that there may be a fluctuation in the numbers but that numbers cannot drop below a certain number. *This can be seen on the standard budget template.

4. **Line item or total expense:** Determine if budget will be managed using line item expenses i.e. the client signs against each line item therefore fixed line expenses. Resources have to be allocated as per line item. Alternatively the budget can be managed using a total expense budget i.e. If the event expense is R1 mil the event organiser can allocate resources as they see fit as long as the scope of work is delivered.

5. **Budget structure:** Decide how the budget will be structured. For example, will the budget group costs according to their function, as CCCVVS, based on each vendor/suppliers quotations or grouped in the same format as the program.
# CCCVVS Budget Format

## TABLE 6: Example of CCCVVS Budget Format

<table>
<thead>
<tr>
<th>DETAIL</th>
<th>Pax</th>
<th>Cost</th>
<th>Sub-total</th>
<th>Totals excl VAT</th>
<th>Totals incl VAT</th>
<th>VAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backdrop activation products/tables</td>
<td>1000</td>
<td>1000</td>
<td>1000</td>
<td>100000.00</td>
<td>100000.00</td>
<td></td>
</tr>
<tr>
<td>Speakers</td>
<td>1</td>
<td>2500</td>
<td>2500</td>
<td>2500.00</td>
<td>2500.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Special event insurance</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Speaker 1</td>
<td>1</td>
<td>25000</td>
<td>25000</td>
<td>25000.00</td>
<td>25000.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Sub-total: 89,000.00

VAT (25%): 22,250.00

Total: 111,250.00

---

### COMPANY

- Identity forms to be signed by all parents
- Capacity sign at entrance to venue
- Registration counter
- Name tags for registration conferences
- White linen at all tables in real planters
- Fresh flowers
- Drinks
- Vases for presents
- Registration service fee
- X-registration staff:
  - 1 person (8:00 - 13:00)
  - 1 person (12:00 - 17:00)
- X-registration staff:
  - 1 person (12:00 - 17:00)

### MEDICAL

- NEMS
- MMC

### SPECIAL MEALS

- On request based on preferences

### FRUIT

- Skewers for blue zone

### ICE

- Lollies

### ELECTRICITY

- Connections & distribution boards

### WATER/EFFLUENT SERVICES

- Services

### CARPETING

- Entrance passage area (R26 per sqm)
- Throughout venue

### BREAKDOWN DAY

- Venue hire
- Setup day: Venue hire
- Event day: Venue hire
- Catering throughout venue
- Catering in entrance passage area (R15 per guest)
- Bar
- Catering staff
- Electric connections & distribution boards
- General cleaning and toilet cleaning
- Food for adults
- Food for kids
- Water chafing dish coolers
- Ice Liners
- Candy floral
- Food stations for blue zone
- Special menu on request based on preferences
- Medical: MAB
- Medical: NEM
- Catering proposal
- Catering for all areas: Recycled four coloured labels
- Catering beverages
- Team meals for food staff

### VENUE

- Decor for entrance
- Hanging signs

### VENDORS

- Photography (Full day)
- Video system
- Event day: Venue hire
- Setup day: Venue hire
- Catering throughout venue
- Catering in entrance passage area (R15 per guest)
- Bar
- Catering staff
- Electric connections & distribution boards
- General cleaning and toilet cleaning
- Food for adults
- Food for kids
- Water chafing dish coolers
- Ice Liners
- Candy floral
- Food stations for blue zone
- Special menu on request based on preferences
- Medical: MAB
- Medical: NEM
- Catering proposal
- Catering for all areas: Recycled four coloured labels
- Catering beverages
- Team meals for food staff

### VENUE: DESIGN & ARTWORK

- Creation of logos (Based on 4 hours artwork)
- Exhibition Hire, Transport to and from venue
- Vases for presents
- Registration service fee
- X-registration staff:
  - 1 person (8:00 - 13:00)
  - 1 person (12:00 - 17:00)

### VENUE: EQUIPMENT

- Additional audio-visual setup
- Event day: Venue hire
- Event day: Venue hire
- Catering in entrance passage area (R15 per guest)
- Catering staff
- Electric connections & distribution boards
- General cleaning and toilet cleaning
- Food for adults
- Food for kids
- Water chafing dish coolers
- Ice Liners
- Candy floral
- Food stations for blue zone
- Special menu on request based on preferences
- Medical: MAB
- Medical: NEM
- Catering proposal
- Catering for all areas: Recycled four coloured labels
- Catering beverages
- Team meals for food staff
6. Managing the quotation process:

All solicited suppliers must send their quotations to the event organiser. They will then comb through the detail ensuring that all scope areas are accounted for and that there are no unforeseens that vendors have not included for example, set up and break down costs, crew food and beverages, transport delivery and collection costs as well as insurances etc. Insist on quotations that include the follow:

- The service or item must include detailed information such as quantities, number of staff, hours of service, square meters, units, days etc. Quote example (a) is a poor quote as it does not include the "detail" required by the event organiser whereas quote example (b) is an example of a good quote. It includes operating times, quantities etc.
- Quotes must indicate:
  - Whether delivery and collection of rented items are included.
  - Transport to and from the venue.
  - Set up and break down costs.
  - Whether food and beverages are to be covered by event host or the vendor.
  - How long staff will be onsite – what is included in the scope of work etc.

Table 7: Example of Program Budget Format
Quotes form part of the budget which forms part of the contractual agreement between the client and the organiser and the suppliers so it is imperative that all information is detailed and accurate.

**QUOTE EXAMPLE: A**

### PANELS

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Panels</td>
<td>1</td>
<td>27 187.50</td>
</tr>
<tr>
<td>Presents, zone and holding area, shell scheme walling</td>
<td>1</td>
<td>8 250.00</td>
</tr>
</tbody>
</table>

### PROMOTERS:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Promoters</td>
<td>5</td>
<td>595.00</td>
</tr>
<tr>
<td>Transport for activators</td>
<td>1</td>
<td>500.00</td>
</tr>
<tr>
<td>Event Crew Supervisors</td>
<td>7</td>
<td>595.00</td>
</tr>
</tbody>
</table>

### VENUE:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up day: Venue hire</td>
<td>1</td>
<td>10 000.00</td>
</tr>
<tr>
<td>Event day: Venue hire</td>
<td>1</td>
<td>15 000.00</td>
</tr>
<tr>
<td>Parking ushers</td>
<td>1</td>
<td>5 000.00</td>
</tr>
<tr>
<td>Breakdown day: Venue hire</td>
<td>1</td>
<td>12 925.00</td>
</tr>
<tr>
<td>Carpeting throughout venue</td>
<td>1</td>
<td>50 000.00</td>
</tr>
<tr>
<td>Carpeting in entrance passage area</td>
<td>1</td>
<td>2 000.00</td>
</tr>
<tr>
<td>Water/Effluent services</td>
<td>1</td>
<td>1 200.00</td>
</tr>
<tr>
<td>Electricity surcharge</td>
<td>1</td>
<td>2 500.00</td>
</tr>
<tr>
<td>Electrical connections &amp; distribution boards</td>
<td>1</td>
<td>10 000.00</td>
</tr>
<tr>
<td>General cleaning and toilet manning</td>
<td>1</td>
<td>4 000.00</td>
</tr>
<tr>
<td>Food for adults</td>
<td>350</td>
<td>165.00</td>
</tr>
<tr>
<td>Food for kids</td>
<td>350</td>
<td>70.00</td>
</tr>
</tbody>
</table>

**QUOTE EXAMPLE: B**

### PANELS

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Panels - Full for walling including support: Sqm (150 m²)</td>
<td>1</td>
<td>27 187.50</td>
</tr>
</tbody>
</table>

### PROMOTERS:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Promoters @ R85 per hour (08:00 - 16:00)</td>
<td>5</td>
<td>595.00</td>
</tr>
</tbody>
</table>

### VENUE:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up day: Venue hire: Open &amp; close times &amp; what services are included in this?</td>
<td>1</td>
<td>10 000.00</td>
</tr>
<tr>
<td>Event day: Venue hire - Operating times, venue personnel on duty?</td>
<td>1</td>
<td>15 000.00</td>
</tr>
<tr>
<td>Parking ushers: How many and what hours?</td>
<td>1</td>
<td>5 000.00</td>
</tr>
<tr>
<td>Carpeting in entrance passage area: How much per sqm? (R20 per sqm)</td>
<td>1</td>
<td>2 000.00</td>
</tr>
<tr>
<td>General cleaning and toilet manning: Times and no. of personnel</td>
<td>1</td>
<td>4 000.00</td>
</tr>
<tr>
<td>Food for adults: Does this include CCCVVS? Special meals? Cutlery, Crockery, glassware?</td>
<td>350</td>
<td>165.00</td>
</tr>
<tr>
<td>Food for kids</td>
<td>350</td>
<td>70.00</td>
</tr>
</tbody>
</table>
7. **Populating the budget:** The next step is to populate the budget with the figures and costs.
   Here are some tips:
   - Include a per head option as easier to sell than total cost.
   - Accurately project audience numbers.
   - Build in a contingency.
   - Consider which items are VAT exempt items for example passenger transport, car rentals, accommodation and vat exempt suppliers.
   - Remember that most excel spreadsheet templates automatically include 14% VAT, therefore the event organiser must deduct 14% off the cost when inserting it into the budget. Otherwise there will be X 2 vat amounts.

8. **Finalising the budget:** The last step is to finalise the budget and from then onwards manage the budget.

9. **Post event:** After the event during the closure stage the event organiser will complete the “Actuals” portion of the spreadsheet. This refers to what items actually cost. It allows the organiser the opportunity to evaluate the different between the predicted costs versus the actual costs.

### THE BUDGET TEMPLATE

When using a budget template always include budget terms and conditions, page numbers with headers and footers, an area for the client to sign and ensure that drafts are marked as such with a watermark. Once the budget is finalised the budget can have a “finalised” watermark. Also include any important disclaimers that the client should be made aware of.

**For Example:** Event Company/Event Organiser X is not responsible/liable for changes in prices due to increases or scope changes made by the client. Should the client wish to include added features the budget will be amended, revised and then resigned. Event Company/Event Organiser X has made every effort to ensure that the prices are as accurate as possible based on vendor quotations. This budget is valid for 21 days.

**Insurances:** Added insurances are not included on this budget outline and are the responsibility of the Client and specific vendors.

**Replacement costs:** The client is responsible for any and all replacement costs relating to the event - should items be taken by guests.

### COST MANAGEMENT CHECKLIST

1. **COST DISCOVERY**
   Find out what clients budget is from CIF do they have sufficient budget for scope?
   Identify budget structure and format to be used.
   Zero based or incremental budget.
   Expense range.
   Vat inclusive or excluding vat.
   Contingency available.
   Availability of funds/payment process: when, how and who.
   Identification of event requirements.
2. COST RESEARCH AND DEVELOPMENT
Get first draft quotes from vendors/venue/speakers.
Compile first draft budget with options.
Cost budgeting.
Research and compare 3 quotes.
Gather historical information if available.

3. PROPOSED COST MANAGEMENT PLAN
Proposed budget.

4. COST CONFIRMATION BY CLIENT
Cost control: how will this be managed?
Initial proposed budget confirmed.
Budget signed off.
Line item or total expense.
Agreement on budget structure.
Fixed + variable expenses.
Breakages.
Vat exempt items on budget.
Audit fees.
Bank charges.
Vat considerations.
Cash flow projection report.
Income projection report.
Purchase order.
Invoice client upon confirmation.
Payment of invoice/deposit.
Confirmed preliminary costing.

5. FINANCIAL PLANNING
Quotes + terms and conditions received.
Quotes + terms and conditions signed off.
Scope areas defined.
Budget updated if scope changes.

6. FINANCIAL APPROVAL BY CLIENT
Approve entire budget.
Approve refund method.
Approve min. and max. numbers.
Approve contingency.
Approve gratuities percentage.
Approve method of managing budget.
Approve scope changes to budget – how will this be handled?
Approved tips.

*At this stage any changes made btw confirmation stage gate and planning can be revised and signed off for approval. Beyond this point any changes to scope and costing must be addressed and signed off as part of a new scope with a new budget amount allocated.
7. FINANCIAL MANAGEMENT
   Final invoices from vendors/venue/speakers.
   Payments made.
   Income report sent to client.
   Expense report sent to client.
   Proof of payments sent to suppliers.

8. @ THE EVENT
   Managing financial scope.
   Ensure all scoped items remain fixed.
   Check @ event for discrepancies with food and beverages, venue hire, catering numbers etc.
   Sign off final bill @ event: double check amounts.

9. CLOSURE
   Final recon of budget.
   Finalised actuals.
   Final balance payments.
   Final payments report.
   Final income report.
   Final expenses report.
   Copy of food and beverage bill from venue.
   Copy of accommodation listing report from venue with all accounts and incidentals.
   Copy of all invoices from vendors, venue and speakers for client.
   Projected budget vs. Actual budget.
   Total amount summary.
DESIGN STRATEGY

Covered in this section:
- Concept and Theme Design
- Environment Design
- Production Design
- Entertainment Design
- Catering Design
- Program Design
- Invitation Design
- Content Design

OVERVIEW

The Design Domain focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions. The elements developed within each functional area combine to create the event experience encounter that will either be enjoyed or endured.

Design utilises experiences, decoration and styling to “Tell a Story”. It is the conception of a structure for an event, the expression of that concept verbally or visually, and, finally, the execution of the concept. Experience is knowledge of or skill of some thing or some event gained through involvement in or exposure to that thing or event.

Event design is the conception of a structure for an event, the expression of that concept verbally or visually, and, finally, the execution of the concept. Decoration is the adornment and beautification of the event. The event design incorporates content, concept and theme, catering, entertainment, environment, invitation, production, program and promotions design.
It usually requires a unique blend of skills: creative vision, problem solving skills and technical ability. While some companies handle events as large as the Olympics, most of the designers specialize in smaller events like weddings, fundraisers, parties and even festivals or conferences. Event design includes the conceptual development of the event, coordinating vendors and executing the design, which may require as little as lighting design to building entirely new structures to create the maximum impact and enjoyment for the event's attendees or participants.

Conceiving and executing any corporate event can be overwhelming. If it is a large-scale event, there will be any number of tiny details to take care of. It is important that a plan be in place to deal with anything that can possibly go wrong. It is one thing to plan a business meeting for 20 people or a small cocktail function. However, when you are looking at a banquet for 500 people, with live entertainment, waiter service and VIP guests, you need expertise.

One of the key reasons for using a professional event planning company is for them to execute a plan with the minimum of stress, allowing the client to concentrate on the important details without worrying about the food getting cold or the band arriving late.

Specialised event production services can turn an event into something spectacular. Production services such as lighting and set design, creative writing, staging, show direction, special effects, video production and sound design can help make an event a dazzling success.

**Event Design Process**

The process to design an event that will offer this experience will be as follows:

---

**Figure 22: Event Design Process**
The client briefing has taken place with the needs assessment. With the client’s requirements and expectations at hand, the following steps in the process need to take place. Before any of them can take place, you need to ensure that the right environment for event design exists.

**DESIGN CHECKLIST**

**CONSIDER THE FOLLOWING:**
Venue set up.
Furniture.
Décor/Decoration.
Layout.

**VENUE SET UP:**
Primary venue set up.
Secondary space set up.
Tertiary space set up.
Long side vs. short side.
Aisles.

**FURNITURE:**
Table type.
Chair type.
No.
Dimension.
Speakers table.
Speakers chair.
Registration tables.
Registration chairs.
No.
Seating per table.

**DÉCOR/DECORATION:**
Linens.
Props.
Serviettes.
Serviette fold.
Draping.
Areas.
Draping colour.
Draping style.
Centrepieces.
Décor lighting.
Ceilings.
Floral arrangements.
No. Floral arrangements.
Ice sculptures.
Living décor.
GENERAL REQUIREMENTS
Décor company to send design storyboard.
Décor confirmed and signed off.
Storyboard with images to be approved.
Mock ups.
Sketches.
Colour scheme.
Layout.
Décor elements chosen.
Décor/design for:
Registration areas
Restrooms
Primary space
Secondary space
Tertiary space
Stage
Entrances
Parking areas
Welcome areas
Lifts
Décor compliance.
Flame retardant for fabrics/ props/ materials.
Work at heights compliance.

DESIGN ASPECTS
Catering at event.
Content at event.
Environment/site.
Production and technical.
Promotions for event.

OPERATIONS
Infrastructure.
Logistics.
Production.
Site.
Speakers.
Technical and production.
Lighting pin spots.
Special effects.
Lighting for décor elements.
Production.
Staging.
Entertainment.
Housing.
Catering.
Signage.

DÉCOR ELEMENTS
Centrepieces.
Backdrops.
Focal features.
Flowers/Plants.
Confetti.
Smoke machines.
Table numbers.
Candles.
Napkins.
Ice sculptures.
Place cards/ menus.
Scrim.
Pipe and drape.
Flooring/ carpeting.
Staffing/ costumes.
Food and beverages.
Signage.
Linens.
Furniture.
Tableware.
Glassware.
Props.
Bars.
Chairs and tables.
Menus.
Serving ware.

DÉCOR RESTRICTIONS
Confetti.
Candles.
Vehicles for demos.
Helium balloons.
Live animals.
Water effects.

CONCEPT AND THEME DESIGN

How will concept and theme be pulled throughout design?

The concept and theme are the building blocks from which all other design elements will be determined. They will determine the design of the environment or site, production, entertainment, catering, program, content and invitation.

It is however important to state that there may be limitations, restrictions and constraints within the environment, production, entertainment, catering and program that effect how the concept and theme are interpreted and translated in the design. It is crucial that the event organiser research what can be done within these areas so as not to hinder the design process.
The concept and theme may be composed of many elements. It is the event organiser's role to determine which design elements “tell the best story”. They must understand the relationship between the concept and theme and the environment, production, entertainment, catering, program, invitation and content as these are the elements that need to be manipulated within the design to tell the story. These elements are covered in more detail.

**The theme, concept and event design** should be developed before the event organiser can start planning and executing the event. The event operations and logistics (planning) are all based on this. It is central to all planning and therefore has to be fully developed.

![Figure 23: The Relationship between the Concept and Theme and the Environment, Production, Entertainment, Catering, Program, Invitation and Content.](image)

### MATCHING DRESS CODES TO THE THEME

**Dress codes** are important as they allow the guests the opportunity to be part of the experience (theme or concept). They set the tone for the event. If the event is black tie this infers formality, elegance and smartness, and tells the guest to expect an experience that will be formal, elegant and smart. Similarly, if the dress code is themed this infers fun and informality. This may be the experience the event organiser wants to give the guests.

Themed dress styles may be incorporated into the event to add to or enhance the event. If there is a defined theme guests can be encouraged to dress up accordingly. Ensure that there is a reason for the dress code being selected and that it fits in line with the overall concept and purpose for the event.
Dress codes are generally misinterpreted so it is important to educate guests and to provide more information on the organisation’s website as to what the styles include. This will save guests phoning to ask what they must wear.

**DRESS STYLES EXPLAINED**

→ **White Tie:** Or Ultra-formal invitation requires men wear full dress, with white tie, vest, shirt. Women wear long gowns. Formal (‘White Tie’) dress code is normally reserved for Opera, Ballet, Charity Balls, and Royal Events. It is the most formal of all the dress styles.

→ **Black Tie – Tuxedo:** Includes black satin lapels and black trousers with a satin strip down the leg, black bow tie, white unstarched evening shirt and black shoes. When is it appropriate to wear this dress style? When the invitation states Formal, Black Tie, Black Tie Invited or Black Tie Optional, to the opening of the opera, ballet, symphony or formal dinner party or reception.

→ **Creative Black Tie:** Leaves room for trendy interpretations of formal wear. He can go more modern with a tux -- maybe a black shirt, no tie. She wears long or short dresses or evening separates. Sometimes, themed parties call for dress codes or other variations of Creative Black Tie. In that situation, guests can choose a dressy look with a theme (for him, it could be a tux with boots and for her it could be a long dress paired with Southwestern style silver belt and jewelry).

→ **Semi-Formal:** Or After Five means that tuxes are not required, nor are long dresses. An evening wedding (after 6 PM) would still dictate dark suits for him, and a cocktail dress for her. Daytime semi-formal events mean a suit for him and an appropriate short dress or dressy suit for her.

→ **Business Formal:** Is the same as semi-formal for him, but for women it suggests that women opt for more tailored dressy suits and dresses (nothing too slinky or sexy).

→ **Cocktail Attire:** Means short, elegant dresses for her and dark suits for him. Cocktail attire technically means a suit for men, and a cocktail dress for women, which usually means a short dress (preferably not career wear). I prefer a little black dress -- and depending how formal you think the event is, you can glam it up with accessories. Of course you have lots of leniency in what you wear -- a dressy pantsuit, a lovely skirt and top, etc. Everyone interprets the meaning of dress requests differently.

→ **Dressy Casual:** Calls for dressed-up versions of casual looks. For him, it could be trousers and a sport coat, for her a dressy pants look. Jeans, shorts, T-shirts and other casual looks are not appropriate for dressy casual. Casual generally means anything goes.

→ **Dark Suit or Lounge Suit:** Refers to dark charcoal, dark blue and black suits. Only black, dark grey and dark blue are recognised dark suit colours. Brown and green suits are not recognised as dark suit colours. A bow tie is not worn with a dark suit. This is worn to a function commencing 18:00 or later or at formal luncheons. The more important the ceremony is, the darker the suit will be worn. Lounge suit (suit and tie) is usually indicated for receptions held after 6:00 p.m. This attire may also be worn for morning coffee parties, luncheons, breakfasts, afternoon teas, garden parties, evening outdoor receptions and evening receptions.
Day Suit: This indicates a suit jacket and trousers – made of the same material and the same colour, with a tie shirt, matching tie and shoes. It is worn during the day but not to functions commencing after 18:00 or later (except cocktail receptions when so indicated).

Jacket and Tie Required: This option can be worn to informal occasions when suits are not recommended but a certain degree of formality still exists, a blazer, slacks, shirt and tie can be worn. A polo neck shirt or “Madiba shirt” will also be acceptable. This shirt must have long sleeves worn with all buttons fastened.

No Jacket and Tie Required: This dress code is usually used at social gatherings like company braais where the host want an informal function.

Cultural Attire: Refers to ethic or cultural heritage or traditional clothing.

ENVIRONMENT, ENTERTAINMENT AND PRODUCTION DESIGN

The environment, entertainment and production design involves creating settings and environments that help the event develop into a combination of outcomes. The entertainment forms part of the experience, and experience is part of design. The design of the environment facilitates the overall experience and forms part of the physical design of the event. Production includes the audio, visual, video, lighting, staging and layout on stage and the design of the show.

Creating the environment can be one of the most enjoyable tasks in staging an event. Use the venue floor plan as a foundation to design the event. Start with the “big picture” and plot out where the stage and dance floor will be, key décor elements, and interactive activities.

The event organiser should think of themselves as an attendee and “walk” through the floor plan. What is being seen, heard, and experienced? Be creative and do not be afraid to make mistakes. During this stage the event organiser will find that the event will quickly evolve into a “big picture” overview. From this point, drill down with more features and details.

As the design of the event evolves, the logistics become more prominent and integral to the management process. The success of any design requires a solid and detailed plan for its execution.

ENVIRONMENT: SITE DESIGN

OVERVIEW

When moving many people through an event, knowledge of the venue floor space is crucial to proper planning. When a large number of guests require table accommodations for dining, attending classroom lectures, or perusing multiple vendors on display, floor space is taken up by furnishings, requiring adequate traffic zones to accommodate guests moving throughout the selections.

Location of electrical outlets, essential for lighting, computers, sound equipment and running vendor refrigerators will determine the location of display booths, ticket counters, and food carts.
Stages require a lot of room, as do dance floors and areas determined for lecture seating. Product display booths may be joined together by means of backdrop curtain units used to define display spaces, and the widespread use of computers requires access to Internet capabilities.

Event guests themselves require space. The venue must comply with local codes, which establishes the number of bodies that can safely fill the venue, while making room for all the accompanying accessories that make the event a success. Live bands require space for the setup of instruments, the placing of speakers, and the positioning of related sound equipment, electrically driven. Furthermore, caterers will require food preparation areas, places to store needful plates, silverware and glassware, and areas for servers to congregate. Not to be overlooked are the facilities for after-meal plates to be washed, and garbage to be gathered for disposal.

Bar service areas necessitate storage for ice, space for guests to place their orders, and facilities to store liquors, mixes, glasses and garnishments. Display props also take up valuable floor footage, such as signage easels, urns and large floral displays. Placement of information booths and security stations, storage for gifts and giveaways, set-ups for concert back-stage areas and spaces to contain a queue of devoted fans for celebrity autographs are but a few of the many uses of floor space a floor plan helps to plan and define.

| PLANNING THE LAYOUT FOR A CONFERENCE, SMALL MEETING, RECEPTION OR SEMINAR |

Whether planning a conference, small meeting, reception, or seminar, designing the layout of a meeting is crucial to event planning success.

Meeting design layout is a fundamental logistic that requires meticulous details pointing to a simple objective. There are several standard set-ups for meetings that are used according to purpose and capacity.

- **Classroom style** is the basic set-up for most functions such as seminars, conventions, town hall gatherings, and large performing events. This is also standard for panel discussions large and small which involves a table at the front of the room or a row of chairs for panelists as the focus of the room.

- **Convention or Conference** set-up is the larger version of a classroom set up, of at least 250 or more people with a keynote speaker. However, classroom deals with approximately 30 to 150 people. The idea is that there is primary focus towards a stage, speaker, or presentation.

- **U-Shape Style** is designed in the form of the letter U for an interactive type meeting that provides a horseshoe like round table for participants. It typically involves the presenter, audio-visual equipment and presentation at the open space end fostering a closer-knit atmosphere for 10 to 30 people. This layout is best for seminars and training sessions with PowerPoint presentations or videos.

- **Hollow Square** set up is a regular square or rectangular shape with an enclosed space. The speaker or presenter is outside the square and can be seated or standing while conducting a small meeting or training that fosters an interactive atmosphere.
• **Theatre** is much like the classroom in that the layout is designed to have the audience facing the area of presentation. However, just like a theatre, the rows of seating are descending for a better view. This layout would most likely be in a room with descending or ascending rows of flooring as well. Theatre design is ideal for lectures, speeches, master classes, and seminars seating up to 100 to 175 people comfortably.

• **Executive or Committee meetings** usually employs a small private room with an extended round table sometimes with plush seating. Video or conference calling are standard in meetings like these that take on a VIP level of engagement for important decision-making.

• **Receptions** are more open spaced with high tables scattered throughout the room to create the ambiance of a get-together while maintaining a business event feel. Receptions usually involve hors d’oeuvres and the high tables encourages movement because there are no chairs but resting places for disposed food and dine-ware as well as surfaces to exchange information. This set up is ideal for networking functions, book signings, product launches, or corporate mixers. Receptions can also serve as pre-cursors to larger events like banquets and formal galas.

• **Banquets** are usually laid out with round tables that seat 6 to 8 people. Sometimes tables can seat up to 10 to 12 attendees. They are spaced apart with a rectangular head table at the front of the room slated for speeches and presentations. There are occasions where half round tables are used according to the purpose, design, and capacity. Any banquet style set up normally includes a several course meal. Sometimes banquet stations are established for buffet or brunch style mode with meat carving stations for people to move about and mingle as they eat. This layout is great for award dinners, celebrity roasts, annual functions and of course weddings. Nevertheless, banquets can be large or small, depending the organisers.

• **Galas** are the familiar formal functions that require everyone to dress up in gowns and tuxedos to mingle, mix, and even dance. There is usually no table or chair set up but the layout is in set design and lighting to create the ambiance of a desired theme. Galas are more glamorous often used for fundraisers, costume balls, inaugural balls, or high profile functions. The capacity can go as high as a 1000 guests.

There are several common denominators that make design layouts effective for meetings. They are great planning, logistics and specifications, audio visual, and clarity on purpose with established capacity and space. Using these standards will lay a quick foundation of design stability for any successful event when used for the right function.

The elements of space use and function room set - up design have evolved over the past few years to include the notion of an experience. Many event organisers are seeing the link between an event, and the art of the theatre. An on – site inspection of a proposed event site or facility should take place before the planning process is concluded. It is the event organiser’s responsibility to create a positive environment through efficient and effective space use and set – up design.
DESIGNING THE SITE PLAN

Once the site has been selected and contracted for, you must determine how best to allocate space. Space, like time is finite. It begins as a blank canvas on which you can “paint” the event elements. You must consider placement, proximity, and accessibility, and position the activities, equipment and service areas according to the needs of the event and the constraints of the space. Your site plan must also include the logistics and setting up, servicing, and clearing of the event site.

- **Identify Spatial Requirements**: The organiser must incorporate into the site plan the spatial requirements of all equipment and elements needed, including both the “footprint” (the actual space on the floor or ground) and the area required around a particular piece of equipment or event activity. Review the checklist below which includes all the floor plan or site elements that will need to be built into your plan.

- **Understand Proximity Issues**: Safety and sanitation issues must be carefully considered: the juxtaposition of food services areas and toilet facilities; slip and trip hazards posed by cords, cables, wires, hoses, lines and connections associated with power or water; and ventilation or container security requirements for petrol, and other gases used for cooking, heating, filling balloons, or portable generators. The organiser must also anticipate the potential areas of congestion. All logistical requirements of the production and servicing of the event must be considered from the perspective of proximities as well.

- **Storage Considerations**: Storage areas and facilities must be identified and positioned to ensure a clean, sanitary, and attractive event space. You may require storage rooms that can be locked to protect valuable goods.

- **Traffic Flow**: Designing a site plan involves the direction and control of human and vehicle traffic flow – the movement to, though, around, within, and away from the event site. There must be sufficient space allotted to allow access, egress, and easy passage within the event. Human traffic may be managed through the use of barricades, fencing, or rope and stanchions to help direct and control the flow entering or departing the event or at activities within the event. The layout can also affect service flow. The tables at a large banquet function should be set in quadrants, with wider aisles between to facilitate efficient serving and clearing. Vehicular traffic considerations includes zones for passengers to drop – off and pickup, taxis and coaches, loading and unloading materials, service vehicles use to replenish supplies, and the vehicular traffic that normally surrounds an event site. Exercise care whenever pedestrians and vehicles are likely to occupy the same space. Also consider establish staging or marshaling areas where people and/or equipment may gather or line up prior to the start of the event.

- **Accessibility**: The event site must be accessible to all those invited to attend (guests, delegates, attendees, audience), those required to attend (staff and suppliers), and those expected to attend (performers, participants, and volunteers). It must accommodate people with special needs, often by ensuring that all obstructions or barriers are minimized or eliminated. Accessibility issues have logistical implications. The organiser must scan the event site and its environment to ensure that goods and services can be transported and delivered efficiently and effectively.
- **Occupancy**: Of particular importance to events are the occupancy regulations regarding fire safety. Ensure you are aware of what these rules, regulations and legislations include.

<table>
<thead>
<tr>
<th>Site or Floor Plan Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Administrative Areas.</td>
</tr>
<tr>
<td>• Air Walls.</td>
</tr>
<tr>
<td>• All Exits.</td>
</tr>
<tr>
<td>• Audiovisual Equipment.</td>
</tr>
<tr>
<td>• Barricades/Ropes and Stanchions.</td>
</tr>
<tr>
<td>• Busing Stations.</td>
</tr>
<tr>
<td>• Carpets.</td>
</tr>
<tr>
<td>• Catering Areas/Kitchens.</td>
</tr>
<tr>
<td>• Command Centre.</td>
</tr>
<tr>
<td>• Dance Floor.</td>
</tr>
<tr>
<td>• Décor Elements, Props and Drops.</td>
</tr>
<tr>
<td>• Direction of Flow of People Entering Room.</td>
</tr>
<tr>
<td>• Doors – Entrance and Exit.</td>
</tr>
<tr>
<td>• Electrical Outlets.</td>
</tr>
<tr>
<td>• Emergency Access.</td>
</tr>
<tr>
<td>• Entertainment and Equipment.</td>
</tr>
<tr>
<td>• Environmental Controls.</td>
</tr>
<tr>
<td>• Exhibits and Exhibitors.</td>
</tr>
<tr>
<td>• First Aid and Medical Services.</td>
</tr>
<tr>
<td>• Food and Beverage Stations/Concessions.</td>
</tr>
<tr>
<td>• Furnishings.</td>
</tr>
<tr>
<td>• Games and/or Rides.</td>
</tr>
<tr>
<td>• Green Room/Dressing Rooms.</td>
</tr>
<tr>
<td>• Hallways and Pathways.</td>
</tr>
<tr>
<td>• Hazards (bodies of water etc.).</td>
</tr>
<tr>
<td>• Hospitality Areas.</td>
</tr>
<tr>
<td>• Information Stations.</td>
</tr>
<tr>
<td>• Lighting (house and decorative).</td>
</tr>
<tr>
<td>• Loading Dock or Area.</td>
</tr>
<tr>
<td>• Lost and Found.</td>
</tr>
<tr>
<td>• Main Entrance.</td>
</tr>
<tr>
<td>• Media Areas or Lounges.</td>
</tr>
<tr>
<td>• Obstructions (pillars, posts, chandeliers).</td>
</tr>
<tr>
<td>• Parking Areas and Designations.</td>
</tr>
<tr>
<td>• Participant Lounges/Facilities.</td>
</tr>
<tr>
<td>• Pipe and Drape.</td>
</tr>
<tr>
<td>• Platforms and Risers.</td>
</tr>
<tr>
<td>• Power Outlets/Generators.</td>
</tr>
<tr>
<td>• Prep Areas.</td>
</tr>
<tr>
<td>• Registration/Admission Areas.</td>
</tr>
<tr>
<td>• Rigging Points.</td>
</tr>
<tr>
<td>• Roads and Routes.</td>
</tr>
<tr>
<td>• Seating.</td>
</tr>
<tr>
<td>• Security Areas.</td>
</tr>
<tr>
<td>• Sound Equipment.</td>
</tr>
<tr>
<td>• Special Effects.</td>
</tr>
<tr>
<td>• Staff/Volunteer Lounges.</td>
</tr>
<tr>
<td>• Stages and Backstage Areas.</td>
</tr>
<tr>
<td>• Staging/Marshaling Areas.</td>
</tr>
<tr>
<td>• Stairs.</td>
</tr>
<tr>
<td>• Storage Areas.</td>
</tr>
<tr>
<td>• Tables.</td>
</tr>
<tr>
<td>• Tech. Booth.</td>
</tr>
<tr>
<td>• Telephones.</td>
</tr>
<tr>
<td>• Tents/Marquees.</td>
</tr>
<tr>
<td>• Ticket Booths/Tables.</td>
</tr>
<tr>
<td>• Toilet Facilities.</td>
</tr>
<tr>
<td>• Utility Lines/Connections (power drops).</td>
</tr>
<tr>
<td>• Vegetation (permanent or potted).</td>
</tr>
<tr>
<td>• Vehicle Drop – Off Zone.</td>
</tr>
<tr>
<td>• Vendor or Service Access/</td>
</tr>
<tr>
<td>• Waste Control.</td>
</tr>
<tr>
<td>• Water Outlets.</td>
</tr>
<tr>
<td>• Windows.</td>
</tr>
</tbody>
</table>

Many event organisers are seeing the link between a meeting or event and the art of theatre. According to Pine and Gilmore in the *Experience Economy*, meetings and events should be designed to provide a theme, send positive cues for learning and meaning, eliminate cues that do not support the goal of the meeting or event, and incorporate all five senses.

It is important that the event designer take into consideration the objectives of the meeting or event, designing the function space set – up creatively, planning for the physical and psychological comfort of the participants, and using space efficiently.

Take into consideration:
- The movement of the attendees throughout the day.
- The lighting needed in the room.
- The use of technology.
- Level of experience of the speaker/entertainment.
- Group dynamics.
- Degree of participation and involvement.
- Visibility issues, sightlines and projection throw.
- Ability to hear the presentation.
- Formal or information meeting/event style.

Event organisers and coordinators work closely with facility staff to use meeting space correctly and effectively.

The assignment and selection of the meeting rooms are based on the meeting objectives, and type of event, capacity required, and physical factors such as:
- General location in relation to other facilities.
- Configuration of the room, including dimension, ceiling heights, door placement, and maximum room capacity.
- Dropped ceilings, obstructions, chandelier placements.
- Restroom accessibility.
- Room acoustics.
- Lighting systems.
- Ventilation, heating, and air conditioning.
- Location of kitchen in relation to meeting room.
- Quality and placement of portable walls.
- Sound systems.
- Noise leakage from hallways, service corridors, and portable air walls.
- Appearance and décor.
- Security.

A meeting room can enhance or inhibit productivity, encourage or discourage communication, promote or stifle creativity and make participants feel relaxed or tense.

If the learner is not psychologically comfortable within the learning environment, then learning may not take place. Psychological comfort means the environment is seen as being “safe,” a place where the learner is able to take mental risks.

Learning is a multi – sensory experience. Adults learn more when engaged in the learning process on several different levels. Music, colour, movement, and interaction are all factors that work together to create the optimal learning experience. It is therefore important to note that the way event spaces are set up can either encourage participation and interaction or can create an environment that does not provide positive memories or remarks.
DESIGNING ROOM LAYOUTS

The first step in designing a room layout is to consider what type of event it is. Then consider the program as well as the purpose for the event. Once these have been identified one will be able to decide on the type of seating, furnishings etc. For example: If the event is a gala dinner for 450 guests the organiser may decide to use banqueting round tables set up for 12 guests. They would therefore need to ensure that there are at least 38 tables with 450 chairs.

In order to work out these measurements the event organiser can make use of seating software. This will indicate how much space is needed and whether the tables will fit comfortably. The measurements and dimensions for the room including the height of the room need to be known. This information will help accurately map out the room/area. It is important to know what the event program will include for example, if there is going to be entertainment a stage may be required. The organiser can then decide where the stage will go and how big it will need to be etc.

When designing rooms start off by considering what type of projection will be required. Is front projection or rear projection required? Then work out what type of screen is required and the distance from the screen. We will also have to know what size screen to order.

The site layout design will be effected by:
- Capacity calculations.
- Set up configuration.
- Type of event/ program/purpose.
- Award ceremony specific.
- Dancing/no dancing.
- Type of seating style: number of tables and chairs.
- Type of stage: entertainment or presentation.
- Data projector position.
- Screen size and position.
- Food service style.

FLOOR DESIGN PLANNING

It is the event organiser’s responsibility to create a positive environment through the efficient and effective use of space and design. It is important to note that the event organiser must adhere to local fire codes and safety practices and must be aware of what can and can’t be done.

The following physical factors are important with planning the design of the layout and floor area:
- General location in relation to other facilities, including traffic flow.
- Configuration of the room, including dimensions, ceiling heights, door placement, and maximum room capacity.
- Dropped ceilings, obstructions, or other features.
- Restroom accessibility.
- Lighting and location of switches.
- Position, location of ventilation heating and air conditioning.
- Location of kitchen in relation to the room.
- Position of portable room dividers.

1. Site dimensions, floor plans and CAD plans.
2. Capacity requirements.
3. Choose set up configuration: portrait or landscape.
4. Insert entrances, exits, mandatory negative space areas, fire safety equipment and evacuation spaces.
5. Audio visual, staging and lighting floor plan.
6. Tables and chair configuration and layout.
7. Indicate décor and design features.

1. SITE DIMENSIONS

The dimensions of the site need to be determined by requesting information from the venue that includes the length, breadth and height of the room. Floor plans and CAD (Computer Aided Design) plans must be requested from the venue. These will indicate room dimensions, square meters of space, location of doors, exits, entrances, electrical points, fire equipment etc. The venue may also provide a ceiling rendering indicating suspension points, lighting fixture positions, and draping or hanging points.

Figure 24 Example of Floor Plan
2. CAPACITY REQUIREMENTS

Request information from the venue with regard to capacity.

Event planners often have trouble determining how many guests can fit into a specific room. Everyone has been in the situation, where guests are cramped or there is a safety issue because aisles are not wide enough for egress. There are guidelines, thanks to the Convention Industry Council:

Stand up reception.
Minimum of 0.5 m² - ideal being 0.84 – 0.93 m² per person.

Theatre seating (less than 60 people).
Minimum of 1.0 m² - Ideal being 1.1 – 1.2 m² per person. This allows at least 61 cm of space between rows, which is the most comfortable.

Theatre seating (60 to 300 people).
1.0 – 1.2 m² per person.

Theatre seating (more than 300 people).
0.93 – 1.0 m² per person.

Schoolroom general.
1.6 – 2.9 m² per person.
This allows for rectangular tables that are 1.8 or 2.4 m long and 46 cm wide, with 0.61 m per person and 0.91 m between tables as a minimum for optimum comfort.

Banquet seating (152 cm diameter rounds).
1.25 m² per person for optimum comfort for eight persons at the table.

Banquet seating (168 cm diameter rounds).
1.25 m² per person for optimum comfort for nine persons at the table.
Banquet seating (183 cm diameter rounds).
1.75 m² per person for optimum comfort for 10 persons at the table.

Note that these numbers do not allow for any staging or other elements such as décor in the venue. The area occupied by these extra event elements must be taken into consideration if an accurate estimate of capacity is to be determined. For ease of illustration, let us assume that an event will have a stage against the long wall of a rectangular room.

The calculation for capacity is therefore given by the following formula:

$$\text{Capacity} = \frac{\text{Useable area}}{\text{Area per person}} = \frac{(\text{Room length} \times \text{Room depth}) - (\text{Room length} \times \text{Stage depth})}{\text{Area per person}}$$

Likewise, the area used by any other décor elements or hard impediments must be taken into account and deducted from the total useable area. This method of course assumes that the area behind the stage or other impediment is unusable area. The figure below is a graphical representation of this methodology. In this case, the room length is 100 m, room depth 80 m, stage width 20 m, and stage depth 16 m.

![Diagram showing calculation of useable area of an indoor venue](image)

Figure 26: Determination of the Useable Area of an Indoor Venue

In this example, the total room area is 8000 m² (i.e. 100 m x 80 m) but the useable area is only 6400 m² (i.e. 8000 m² – 1600 m²) where 1600 m² represents the unusable area occupied by the stage and the area behind the front of the stage that runs the length of the room.

Assuming that this event is to be a dinner, then the room capacity in this example would be 592 persons (i.e. 8000 m²/13.5 m² per person) if there were no stage, and 474 persons (i.e. 6400 m²/13.5 m² per person) if the stage were to be used in the location drawn.

It’s always best to double check all calculations for room capacity particularly when you expect to be close to capacity or when there are numerous other elements in the mix such as buffet tables, staging, or decor.
SAFE CAPACITIES

A calculation will need to be made that is based on each person occupying an area of 0.5m².

The maximum number of people who can be accommodated can therefore be calculated by dividing the total area available to the attendees by 0.5m².

For Example: An outdoor site measuring 100m X 50m will all areas available to attendees can accommodate a max of 10 000 people.

100m X 50m = 5000m² / 0.5 = 10 000 pax

3. CHOOSE SET UP CONFIGURATION: PORTRAIT OR LANDSCAPE.

There are three principles that should be followed to ensure that room not only facilitate communication during the meeting but also are within the capabilities of the room set – up crew. These principles should guide the choice of configuration and help troubleshoot any room set – up. The event organiser can use the CAD plan to orientate themselves with the site.

There are many possible configurations for setting up function rooms. The choice will depend on the particular requirements of each function, what speakers want to accomplish in terms of atmosphere and potential limitations of any given room.

PRINCIPLE 1: SET TO THE LONG SIDE OF THE ROOM WHEN REASONABLE

If the room is rectangular, put the presenter on the long side. This places more of the general audience closer to the presentation.

- When placing a presenter on the long side of the room, do not place seating at an angle less than 22 degrees to the screen. Otherwise attendees will not be able to read anything on the screen.
- For rear – screen projection, set – ups on the long side of the room will require far more space per person since much more space will be unusable behind the speaker.
- If you are short on space, set the room with the presenter on the short side.

PRINCIPLE 2: MINIMIZE STRAIGHT – ROW SEATING

Straight – row seating is the standard seating supplied by most facilities. One disadvantage in wide rooms is that straight – row seating can restrict the view of attendees sitting at row ends. Also, people in these seats will constantly be turning to view the screen or speaker. So keep the center rows straight and herringbone the end rows. In the straight row, attendees can only see the people next to them and the backs of heads of those in front. Straight – row seating is best for presentations for which audience interaction is not required.

PRINCIPLE 3: AVOID CENTER AISLES WHENEVER POSSIBLE
The center are has the best viewing and should be reserved for seating when possible. However, there will be times when a center aisle is necessary to support part of the programming and safety restrictions.

The most commonly used set – up styles are roundtables, schoolroom, conference, and theatre. Set – ups include tables and chairs, chairs only, or tables only.

4. INSERT ENTRANCES, EXITS, MANDATORY NEGATIVE SPACE AREAS, FIRE SAFETY EQUIPMENT AND EVACUATION SPACES.

5. AUDIO VISUAL, STAGING AND LIGHTING FLOOR PLAN.

Determining the Screen Size

In order to determine the screen size – use the 2 – by – 8 principle.
The 2 – by -8 principle states that no one should be seated closer to the screen than 2 times the height of the screen, nor further from the screen than 8 times the height of the screen.

Firstly, find the distance to the last row of seats and divide this by eight to determine the screen height, then apply the aspect ratio of the media you will using to arrive at the screen width. Divide the distance from the screen to the last row of the audience by eight, and use the resulting number as the height of the screen.

For Example: If the last row of seats (Row 8) is 22 meters from the screen, then the height should be approximately: 22/8 = 2.75 HEIGHT
Use the closest screen size to this. In this instance a 3m in height screen.

The next step is to work out the width of the screen. This can be a 3:4 ratio resolution or 16:9 depending on the format of content. If the client requested a 3:4 aspect ratio then the calculation for the screen width would be 3 meters (screen height) x 4/3 = 4 meters (width of screen). Therefore the screen would be 3 m in height and 4 m in width.

Finally, the minimum distance from the screen to the first row of seating should be at least two times the width of the image on the screen.

Sometimes it is impossible or impractical to use the ideal screen size because of ceiling height or other physical restrictions.

In terms of projector distance to the screen, assume that the projector should be placed approximately 1.5 times the width of the screen. So if the screen is 8 m in height, the projector should be 12 m away.
Finally, the bottom of the screen should be at least 1.5 meters off the ground. It allows the audience to see the image over the person in front of them.

**ASPECT RATIOS**

The projector’s aspect ratio refers to the ratio between its width and height. For example, a 4:3 display produces an image that is squarer, where as a 16:9 ratio produces an image that is more rectangular in shape. The most common video projector aspect ratios are 4:3 (XGA & SXGA), 16:10 (WXGA & WUXGA) and 16:9 (standard HDTV, 1080p).

**Business Video Projector Aspect Ratios**

Most people who use projectors for presentations will find a 4:3 aspect ratio does the trick. However, the computer display industry has been moving away from the 4:3 format in recent years. If the laptop has a widescreen display, a video projector with 16:9 or 16:10 resolution capabilities would likely be a better choice.

**Audio Visual and Technical Equipment**

Indicate where audio visual and technical equipment will be placed on the floor and the ceiling plan.

### 6. TABLE AND CHAIR CONFIGURATION AND LAYOUT.

There are many different table configurations as discussed below.

**Theater-Style, Herringbone**

- Looks like rows of seats facing presenter, chevroned (tapered in) at sides.
- Pros: Allows for maximum number of people per room; brings audience closer to presenter.
- Cons: More seats will fit in straight rows; not good for extended periods (hard to get in and out); no work space for reading or writing; attendee interaction severely limited.
- Variation: Set rows schoolroom-style (with tables) to improve comfort and provide work space; however, this takes up more space and puts attendees farther from the presenter.

**Triple U-Shape, Herringbone**

- Looks like three sections of classroom-style seating at 45 degree angles.
- Pros: Ideal for small to mid-size groups; conducive to conversation among attendees; allows for easy viewing of presentations; easy to get in and out of seating.
- Cons: Not feasible for large groups.

**U-Shape with Schoolroom**

- Looks like standard U-shape, with internal rows of classroom seating.
- Pros: Brings audience closer to presenter; allows for larger groups than traditional U-shape.
- Cons: Can be awkward determining who sits on outside and who sits inside; sight lines can be a problem; audience interaction can be difficult.
Rounds
- Looks like round tables set throughout room.
- Pros: Provides work space; allows maximum interaction between small groups.
- Cons: Participants might be far from presenter; some tables might have poor interaction; can be loud due to simultaneous discussions; sight lines can be difficult.
- Variation: Limit seating to six per table, leaving an open section facing the presenter, for improved sight lines.

Hollow Square
- Looks like classroom-style rows set in a square.
- Pros: Presenter can sit anywhere in the square and see all participants; provides comfortable work space.
- Cons: Not conducive to audiovisual presentations; interaction somewhat limited; not recommended for groups larger than 35.
- Variation: A “royal set” square, with curved corner tables, increases sight lines by 33 percent and makes the room setup look much more comfortable.

V-Shape
- Looks like an open triangle of classroom-style seating.
- Pros: Allows for easy interaction; speaker can be seated or standing inside the setup.
- Cons: Not recommended for groups larger than 27.
- Variation: Set computer monitors at tables to allow for close study of detailed material.

T-Shape
- Looks like a row of classroom-style seating, with a row of double classroom-style seats set perpendicular to form a “T”.
- Pros: Allows for good interaction, particularly between facing rows; provides clear sight lines to A/V placed at bottom of “T”.
- Cons: Can be difficult for interaction between perpendicular rows; not recommended for groups larger than 30.

Auditorium or theater set ups

Features a podium or lectern as the focal point of the function. Once you determine the location of the dimensions of the platform, follow these guidelines for a functional theatre-style set-up:

- First row of seats should be no closer than 1.8 meters from the front edge of the platform or a distance in front of the screen that is two times the screen’s vertical dimension, whichever is farther. For a 2.4 m screen the first row should be no closer than 4.8 m in front of the screen.
- No section of seating should have more than 14 chairs.
- The two side aisles should be at least 1.2 m wide.
- Side sections should be set herringbone or curved, so that
attendees have a more direct sight line to the speaker and
screen. No chairs should overlap the front edge of the stage.
• If the number of rows in a section exceeds 30, the aisles
  should be 2.4 m wide.
• Angle for viewing AV presentations is between 22 and 45
degrees.
• Approximately 33% of a room is devoted to aisles and the area
  in front of the seating area.
• The space between adjacent chairs should be at least 10 – 15
  cms for comfort; however, sometimes fire laws require
  interlocking chairs, which means that there will be no option for
  side – to – side spacing.
• For capacity audience, the space between rows of chairs
  should be at least 61 cms from the back of one row to the front
  of the next row.

School room set - ups

The classroom style setup is great for orientations or any
other presentation when the guest will need to be
writing/eating while observing.
A standard schoolroom set – up accomplishes the speaker –
to – attendee objective.

• The first row of tables should be no closer than 1.8 meters
  from the front edge of the platform or a distance in front of
  the screen that is two times the screen's vertical (height)
  dimension, whichever is farther.
• Tables should be no less than 46 cms wide.
• Allow at least 0.6 meters of table space per person - i.e.,
  three people to 1.8 meter table.
• Aisle spacing is the same as theatre – style seating.

Boardroom set - ups

For smaller groups that need a high degree of interaction, use
a boardroom set – up. This is similar to the conference set –
up.
The U – shape set = up or a hollow square or rectangle with
one side removed. It consists of tables 46 – 76 cms wide, the
length of which are determined by the number of people to be
seated. This type of set – up is the best alternative when
visual aids are used. The Hollow U shaped setup works well
for presentations where there will be interaction between the
guests, and the speaker. The speaker can walk up and down
the hollow box in the "U" interacting with the guests.

The U shaped plus style can be used when space is limited.
Chairs are placed in the "hollow" part of the U. When eye
contact among attendees is essential, avoid long, straight
lines of tables and create angles to improve sight lines.

Herringbone

Herringbone style setup is for dinners that will involve a
speaker. The alignment of the tables allows for most guests to
be comfortable while facing the speaker. The tables are
turned at an angle toward the head/speaker's table. Chairs
are placed on both sides of the tables.
Conference style

Conference style is great for critical thinking discussions. This is the most productive setup when decisions need to be made. You finally have the board of directors all in one place, so develop your action plan in great time. Common setup includes 4 eight foot tables.

Banquets

Banquet rounds come in many sizes. You will need to decide whether you will require a full round table of seating or whether you are only using a half moon.

Geometric shapes

These include diamond, octagon, or oval designs. These designs are preferred for larger groups of 20 or more.

Learning circles

Chairs positioned in a circle for informal discussions

SPACING TABLES AND CHAIRS

• 30 - 60 centimeters is the minimum distance required from chair back to chair back for people and servers to pass comfortably between them.
• There must also be one aisle for every four rows of tables so that servers do not have to go more than two tables deep.
• People average 60 centimeters when sitting in a chair at a table, so 30 centimeters between chairs equals 2 meters between tables.
TABLE NUMBERING

The first thing to consider is whether table numbers are required. Are guests going to be assigned to specific tables, at a specific seat? Are they going to only be assigned to a table but are free to sit anywhere at the table? Are they able to sit at any table at any chair position? These are the types of considerations the event organiser needs to make. By and large it is easier to manage an event where there is seating, if tables have an allocated number. This allows the organiser the ability to know where special meal requirements are, special needs, where award winners or VIPS are etc. This is easier to manage than an event that allows free seating.

Should the decision be made to have table numbers, tables should be numbered starting with Table 1 up to the top left hand side of the room. Tables should not snake across the room from one side to the other as this makes sequencing illogical and hard for people to find their table. A tip is to divide the room into two by placing an aisle in the centre. This will make separate the two areas giving the event organiser the opportunity to seat guests from 1 – 11 (as per diagram) for example, and 12 – 22.

The organiser can then place plasma screens at the entrances with the seating chart for tables 1 – 11 at entrance 1 and tables 12 – 22 at entrance 2. This breaks up the mass of guests and directs them through the door on the side where they will be seated. This means that not everyone enters through one entrance.
7. **INDICATE DÉCOR AND DESIGN FEATURES.**

The last step in designing the floor plan is to indicate any décor or design features that dominate substantial space for example, the décor on the table will not be indicated on the floor plan however props on the side of the room would be.

The finished floor plan should resemble the diagram below.

---

**Figure 28: Table Numbering**

**Figure 29: Completed Floor Plan Example**
REGISTRATION LAYOUT DESIGN

When setting up the registration area the key areas that you need to consider are the following:

- How many people are you expecting?
- How many registration staff will you have?
- What type of set up will you have?
- Are guests/delegates required to register onsite?
- Are guests/delegates going to pay when they arrive?
- What direction are people coming from?
- How many registration bays do you require?
- Do you need a VIP section?
- Will there be chairs for staff to sit?
- Will you be using equipment/technology of any kind?
- Do you need to give our gifts/amenities?
- Where will you store the boxes?
- How will you hide the cables and any other wires?
- Do you have enough space for stationary and other materials you may need?
- Where will lanyards and name tags go? Is there enough space?

REGISTRATION QUEUES

Research shows that the most frustrating aspect of waiting in a line is not knowing how long the wait will be. We all hate waiting in lines, but we all have to stand in a queue or line at some point, and getting into an event is usually one of those times.

The organiser must control these lines to make sure that the waiting is bearable and safe. You will be able to accommodate more people in a limited space by creating a “snake” system with rope and stanchion guides than by simply allowing people to line up in one long queue or, worse yet, in no queue at all. Always have a separate service desk or “courtesy counter” to handle problems or special circumstances, which should be off to the side so that resolving a problem does not impede the progress of the queue.

Figure 30: Serpentine Queue
The goals of any registration process, whether in advance or on-site, are accuracy and efficiency. Both must be achieved within certain time and budget constraints. The responsibility of the meeting manager is to develop a precise method of dealing with paper and people that saves time, minimizes attendee frustration, and provides needed and accurate data.

Attendee data collected during the registration process can be valuable in many other ways. Such data can provide exhibitors with information about attendees’ buying power and spending habits; it can help build negotiation leverage for the next meeting; and it can help to analyze the current meeting and make plans to improve the next meeting. The keys to a smooth on-site registration process are careful planning; use of technology; detailed preparation; good traffic control; and an efficient, well-informed staff.

Registration data:
- Accurate information/spelling of names and company details.
- Extensive.
- Pertinent.
- Timely.
- Accurate.
- Thorough.
- Complete.
- Timely.
**EVENT STAGING ELEMENTS**

The staging of an event involves bringing together all the event elements around a theme. It is where the 'action' takes place at an event – "where the audience looks". Staging is the heart of event management - it is the 'show'. All other aspects of event management surround it.

The elements of staging normally revolve around a theme. The theme has to fit in within constraints, available resources, client expectations and requirements and the budget. The efficient management of events is dependent on deciding what is most important in the given time span - i.e. priority. Different types of events place different emphasis on the staging elements. The staging is all about the guest/audience experience of the show- whether the 'show' is a sports competition, fun run or a reward ceremony.

Event elements can be sourced from the client's briefing about the required event. It would be based on:

- Event goals and objectives.
- Estimated number of participants.
- Client's event history.
- Client's culture, values and interests.
- Available budget.
- Audio visual and Equipment requirements and preferences.

From this information, the event coordination team would then have to match the type of event, the venue and the event goal in such a way as to ensure a successful event.

**DECOR AND PRODUCTION**

Décor is a primary means of establishing a theme environment. It can transform a venue or event site. Like theatrical stage design, event décor is an art form that literally “sets the stage” for the event experience. By selecting the most appropriate furniture, drapery, fabrics, accessories, plants, lighting and architectural features, the coordinator can manipulate the event atmosphere. Remember to consider stages, flooring, tenting, lighting, furnishings, fabrics, focal points, colour palettes and backgrounds.

**ENTERTAINMENT**

**OVERVIEW**

The reason for any given entertainment, concerns the overall message delivered by a performance. The performance must satisfy the audience and client and deliver the promised results based on the original reason for the entertainment.
→ **Physically moving people:** There is no more impressive method of physically moving crowds than to have them follow highly visual and loud performers. This includes the concept of participative ‘party starters’. Example, when guests arrive have dancers that pull them onto the dance floor or escort them to their tables.

→ **Emotionally moving people:** An emotion is considered a response to stimuli that involves characteristic physiological changes – such as increase in pulse rate, rise in body temperature, greater or less activity of certain glands, change in rate of breathing – and tends to itself motivate the individual toward further activity. People tend to confuse emotions with feelings. Events can be used to move people to tears, or to stand up and applause. They can produce real emotions. When designing events it is important to remember to bring in the five senses so as to produce greater emotional feelings – therefore more connection to the event.

→ **Motivation and inspiring people:** As opposed to only trying to stir inner feelings, motivation’s goal is to give the audience a reason to take some action. Almost any form of entertainment can achieve motivation if the content and timing are correct.

→ **Decoration:** A novel and frequent use of entertainment in events is as decoration. The performer(s) take on the persona of decorations that can be either stationary or moving, interactive or inactive. Costumed living statues, interactive entertainers, and look – a – likes are typical of decorative entertainment.

→ **Announcing, introducing or advertising:** Performers may announce, introduce, and advertise people, products, services, and activities. These reasons are lumped together because the concept for each is similar.

**For example:**

- Celebrities as masters of ceremony.
- Herald trumpets to sound a call to dinner, to introduce another segment in an event, or to draw attention to a speaker.
- A personalised video greeting from a celebrity.

**Creating ambience:** Particularly in theme events, establishing the right ambience for the event is one of the first considerations event organisers have. The ambience can be so much more than static décor or lighting, even if the lighting is automated. Adding other sensory input in the form of live entertainment helps to set a ‘living mood.

**MUSIC THEATRE DANCE**

Special event entertainment can be simple in presentation, such as a single act that has no requirements for rehearsals or special technical support. Some entertainment acts do not require a rehearsal. They arrive, they set up and off they go.

However, special event shows involve more than a single act and frequently include scripts, complex rehearsals, technical support, and unique staging. In these cases, considerably more preparation and planning is needed to stage a successful show.
For a show with multiple acts, it is possible to create the illusion of a coordinated presentation through the use of common theatrical elements such as costuming or music. Find a common theme thread to link them all together. For example if you have an MC, a dance act and a band – get them all to stick within the 70’s disco era.

Entertainment Genres

Singing
Musical structure
Musical instruments
Musical ensembles

Storytelling
Drama
Comedy
Group performance
Basic use of prop

Dance
Costuming
Choreography
General dance

Athletics
Feats of strength
Balancing acts
Competition and sports
Juggling
Acrobatics

ENTERTAINMENT SCHEDULING AND TIMING

For stage presentations, in terms of timing there are typically two options:

1. A single continuous show:
   • A single show rarely exceeds 50 -60 minutes in duration.
   • This is because the audience has often been subjected to prior extended and unrelated event segments, namely reception, dinner, speeches, or award presentations, and lacks necessary stamina for a longer show.
   • If a single continuous show has multiple acts of short duration, there is a much better chance of success due to the variety presented, in that more of the audience is likely to enjoy at least one of the acts.
   • With a single act, there is a greater possibility of some of the audience not appreciating it.

2. A show divided into multiple segments:
   • Fortunately the problem of sustained audience attention can be minimized in several ways.
   • Rather than having a single continuous show after dinner at the end of a long event, dividing up the entire show into short segments performed between meal courses works well.
• A show of this type can be divided up yet still maintain a storyline providing that there is a simple link or explanation between segments, such as an MC or a voiceover that can tie them together.
• The duration of such segments should be no longer than 5 – 10 minutes during which the event space must be completely clear of wait staff and food.
• This requires close coordination between the producer and catering or banquet manager in order to ensure that tables are cleared from the previous course and the following course is not served until the entertainment segment is complete.
• The other advantage of this method of presentation is that it permits an extended period for stage changeovers without the audience having to wait.
• You can also rotate entertainment acts. Instead of having one band/signer sign all their songs, get them to sing 2 songs and then leave the stage, whilst being replaced by another entertainer. Then after they have finished, get them back on stage (maybe they can even change their costumes to keep it fresh).

**CATERING DESIGN**

*Catering design* refers to food and beverage presentation and styling as well as all food and beverage elements that can be utilised to focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions.

**CONSIDER THE FOLLOWING:**
- Food styling.
- Beverage styling.
- Food and beverage linked to theme.
- Waiters themed uniforms.
- Decorations.
- Table treatments.
- Food centrepieces.
- Food and beverage lighting.
- Beverages as décor.
- Beverage containers.
- Food containers.
- Food as décor.
- Personnel.
- Food and beverage placement.
- Packaging.
- Displays.
- Crockery, cutlery, glassware.
- Location.
- Choreography of food and beverages.

**AREAS OF SCOPE**
- Design and ideas.
- Costing.
- Personnel.
- Sourcing stock.
- Mock ups.
Program design provides structure of event program elements to achieve specific goals and objectives. The basic elements of program design are the outline, program content and fabric, program format, and the environment where the program will be presented.

Understanding why people attend events will assist in developing the program. Once one understands what drives people to accept the invitation and why they want to attend the event, only then can the event organiser start developing the program.

Although attendance at many corporate events is mandatory, that is not the case for other kinds of events. According to futurist Alvin Toffler, people attend events for a number of reasons, including:

- **Information**: The attendees of today are quite different from their counterparts of event a few years ago. They are younger, more sophisticated, better educated, and hungry for information. They want to learn new content, concepts and skills that will help them today and tomorrow – not five years from now.
- **Networking**: Many attend seeking networking camaraderie and overall collegiality among their fellow attendees. They may just want to share experiences or “war stories” with their counterparts. At some events there may be as much learning during breaks, lunches and hallway conversations as in the meeting rooms.
- **Recreation**: Some people just attend for fun.

Once the purpose of the event has been identified and the goals and objectives have been established, planning can begin to match the best program format to achieve the desired outcome. Constructive and well – organised program – planning sessions are vital to the successful development of subject materials and speakers.

The event program is of vital importance to planning and coordinating an event. This element of the plan is the ‘rationale’ for the meeting or the event and sets out the order of activities and their duration, and the responsibilities of the participants and event organisers.

Creating a favourable image of the event through an attractive program related to the arrangement and organisation of the activities according to imaginative themes with the use of logos, mascots and various symbols to enhance the excitement and experience of the event. The event can also be enhanced by use of rituals, emotional stimulation, great spectacles, entertainment, commercial merchandising and side shows.
The sequence of activities during the event needs to be organised in such a way that the participants are entertained and want to return the next time it is held. Long delays between activities can frustrate crowds and, as a result, crowd management can become a problem, so event programs need to be prompt and activities evaluated on the basis of their relevance. Allowance should be made for food and breaks, rest and recuperation. Crowds cannot sustain high levels of excitement for long periods, and peak entertainment needs to be interspersed with alternative acts to extend the experience.

A determining factor in the success of the event can be the date chosen during the year and the day of the week, the time of the day and duration. In order to ensure that the event is held at the correct time and on the correct date, it is essential to liaise with the project management team who are responsible for programming and managing the development process.

The agenda of an event needs to be prepared at an early stage in order that all role players have a clear understanding of the sequence of event.

Whale (1997) suggests several useful tips to be followed when preparing a suitable events agenda/program, including determining the main attraction and using this as the event ‘pivot’, deciding when refreshments and meals should be served, considering the timing of entertainment, and arranging the program to suit availability of transport.

Generally, an event program is influenced by the scheduled arrival of key performers or speakers. In the case of a conference or meeting, allowance needs to be made for the registration of guests or participants and for a welcoming procedure. The opening event sets the tone for the remainder of the event, and the closing event also can influence the level of experience and enjoyment.

The data gathered from attendee research, in addition to being a key determiner of goals and objectives, will help the organiser plan program content.

When thinking about the right mix of attendees, review meeting objectives and select only the people who can help achieve the results the client is looking for. Based on needs, find a diverse mix to fit the roles. Include as many points of view in your decision making or problem solving.

There are many factors that need to be considered when starting to design the program:
- Is the event formal or information?
- What type of event is it?
- Logistics: Date/time/venue/RSVP details etc.
- What are customers/attendees preferences?
- Do they require transport/flights/accommodation?
- Do they have any special needs?
- Are you audience member’s international attendees?
- How much time do we have until the event? How long do customers have to book/register/confirm?
What needs to be included in the program outline, content, and schedule
- Are their going to be breaks? If so, when and how many?
- Proximity of housing.
- Topic and speaker selection.
- Graphics, logos that will appear on invitation?
- Dress code.
- Price.
- Map and directions to the venue.
- Special meal requirements required.
- Activities.
- Entertainment.
- Amenities and gifts.

A well – paced program that allows time for those attending to enjoy a meal while also presenting content, that will be educational or informative and entertaining is crucial. In most cases the main events of the program should start after the meal. It should culminate in a memorable focal point that will be the takeaway for those attending. Decide what that program will be and how it can fulfill the overall purpose.

**TYPES OF EVENT PROGRAMS**

Different types of events call for different types of programs based on the types of activities need. For example, a conference program might follow an educational format, in other words a program that is adapted for learning; whilst the program for a wedding would be simple and adapted for celebration and entertainment. They can be detailed or short in nature.

Programs can refer to the activities outlined on the invitation as well as the running order of the day. It shows the times and order of proceedings so that customers/guests know what to expect.

Programs can also include:
- Accommodation and facilities for special needs.
- Facilities, accommodation and seating arrangements.
- Food and beverage requirements.
- Maps and directions.
- Duration of the event/activities.

**EDUCATIONAL PROGRAMS**

An educational program outlines the meeting into various activities. The outline combines the appropriate number of educational hours with social and recreational activities. The outline should include time for registration, the opening ceremony or general session, meal and social functions, breaks and a formal closing session, if appropriate for the meeting type.
Program content is the specific sessions or activities that are required to achieve meeting objectives. As the content is being developed, it is important to consider if there are any required sessions that must be included for certification purposes. The program schedule provides the table of time and location for all functions related to an event.

Today’s event participants want to take an active role in their own learning. Build in as many types of audience participation as possible. The speaker is not the only one with great idea and important insights. Develop program formats that “mine the gold” from the audience, and help maintain their interest by making them part of the program.

These formats include:

- **Audience reaction team:** Four or five participants query the main speaker from the stage with questions from the audience and follow – up questions.
- **Buzz session:** A method of increasing audience participation by dividing all participants in discussion groups, each of which reports the group’s findings and opinions during a following plenary session.
- **Colloquium:** An informal meeting for the purpose of discussion, usually of an academic or research nature, in order to ascertain areas of mutual interest through exchange of ideas.
- **Seminar:** A lecture/or dialogue, usually involving a small group of participants – say 10 – 50, who are led by a specialist who meet to share observations or experiences on a particular subject. Often the attendees have different specific skills but have a common interest. There can be significant interaction.
- **Workshop:** Intense, often hands – on learning experience, in which a limited number of attendees participate directly in learning a new skill.
- **Symposium:** A meeting of experts in a particular field, at which papers are presented and discussed by specialists on particular subjects with a view to making recommendations concerning problems under discussion.

**Learning**

Learning refers to the acquisition of knowledge, skills and attitudes through study, observation or emulation. Most learning theorists suggest that learning is a life – long process of self – development or change of behaviour through self – activity. For many people, this can happen as a result of attending events.

**Methods of Instruction**

The methods of instruction that are most adaptable to the meeting environment are expository, participatory, and evaluative.

- **Expository learning:** The instructor presents to the learners and the learners remain passive and watch and listen. This is generally the format for large plenary sessions.
- **Participatory learning:** Occurs when the participants share knowledge and experience and work together to learn. The role of the instructor is to join the group as a member and to share experiences. The role of the instructor is to join the group as a member and to
share experiences. The more participants are induced to share ideas with each other, the greater the level of participant interest and commitment.

- **Evaluation learning:** This method tests whether participants learned what was expected, and if they can use the information effectively. Verbal questions, tests and exercises, and self-assessment are used to tease a participant's knowledge of the subject matter.

Adults learn best through involvement and experience. The best educational programs combine all three methods of instruction. One effective program design is to begin with an expository approach, move on to participatory learning, and end the session with evaluative learning. Provide the attendees with as many choices as possible.

Program management concerns the formation and choreography of the agenda of activities, elements, exhibits, and amenities that shape the composition of the event experience to address the ceremonial, hospitality, and communication requirements of the goals and objectives of the event project.

The best way to format a program for a dinner event be it a gala dinner, banquet, awards ceremony or year-end function, is to:

1. Start by simply listing all the activities and items that will need to be included in the program. They don't have to be in order, simply listed.
   
   For Example: For an awards gala dinner event the client states that these are the activities and items that need to be in the program.
   
   Welcome by CEO - 15 mins.
   
   2 sets of Excellence Awards - 30 mins each.
   
   1 set of Performance Awards - 20 mins.
   
   Opening show.
   
   Sponsor CEO presentation - 10 min.
   
   3 course meal.
   
   DJ.
   
   At least 2 entertainers.
   
   Master of Ceremony.

2. Next, assess when guests would leave the event. This may be dictated by the end time that the venue has set in normal instances midnight. Guests generally leave between 23:00 – 23:30 if we use the example above.

3. Once it is known what the end time is, decide what time the event should ideally start. For example, for an event happening on a weekday the event would need to start earlier, and finish earlier. However for a Saturday event one can start slightly later if required. In most instances where there are many program activities that will need to be covered it is advisable to start at 18:30.
Start 18:30
Welcome by CEO - 15 mins.
2 sets of Excellence Awards - 30 mins each.
1 set of Performance Awards - 20 mins.
Opening show.
Sponsor CEO presentation - 10 min.
3 course meal.
DJ.
At least 2 entertainers.
Master of Ceremony.
Finish 23:30

4. Then consider when the ideal time would be for guests to eat and how many courses will be served. Indicate the approximate service times. At this point, it is not necessary to know exactly what is being served as the event organiser may find that they need to change the meal due to time constraints. For example, if the event organiser finds that they need an extra 15 minutes on the program to accommodate an activity, they could change a hot served starter to a cold pre-plated starter which is already on the table when guests are seated.

Start 18:30
18:30 – 18:50 Starter (20 mins)
20:00 – 20:45 Main (45 mins)
10:00 onwards Dessert
Welcome by CEO - 15 mins.
2 sets of Excellence Awards - 30 mins each.
1 set of Performance Awards - 20 mins.
Opening show.
Sponsor CEO presentation - 10 min.
DJ.
At least 2 entertainers.
Master of Ceremony.
Finish 23:30

5. Next organise times to see if everything can be accommodated.

Start 18:30 As guests arrive have opening entertainment act.
18:30 – 18:50 Starter (20 mins)
18:30 – 18:50 Entertainer 1: Background Entertainment Playing During Starters
18: 50 – 19:00 MC Welcome
19:00 – 19:15 Welcome by CEO 15 mins
19: 15 – 20:00 Excellence Awards 30 mins
20:00 – 20:45 Main (45 mins)
20:45 – 20:55 Sponsor CEO presentation
21:00 – 21:45 Entertainer 2: Main Act
22:00 onwards Dessert
22:00 onwards DJ
Finish 23:30
BREAKFAST PROGRAMS

*Breakfast programs* are by nature short and sweet usually only lasting a few hours. The purpose for the breakfast is to provide guests with breakfast and some sort of content or information.

When designing a program for breakfast sessions ensure the following:

1. The day and the date are clear on the program.
2. The time that is starts and finishes.
3. The location for the event.
4. Dress code applicable.
5. Information on the highlighted speaker.
6. You can include the type of foods that will be served as well as activities that will take place.
7. The emphasis here is to show people that this event is worth their time and effort.
8. Ensure your invitation is visually appealing and grabs people’s attention.
9. For formal events the program will be printed and placed on the menu which will be placed on tables for guests.
10. Indicate the start time but not the finish time.
11. Stagger the program to include entertainment.
12. Be aware of what time people will eat their main meal as no one wants to eat at 11pm.

EDUCATIONAL PROGRAMS

When designing a program for training event ensure the following:

1. Ensure there is time to welcome people at the beginning of the session – generally done by a continuity director.
2. Ensure that you have a flow. Start the morning with introductory sessions leading into more intense discussion points between 10:30 – 12:30 just before lunch.
3. Give speakers at least 35 – 45 minute sessions.
4. Allow time for questions and answers.
5. Allocate break times at least 3 times during the day.
6. Place keynote speakers at the end of the day if possible as it ensures that people stay.
7. Remember the grave yard shift after lunch. Try bringing in fun, group sessions that keep people busy so they don’t fall asleep.
8. Try finish before 17:00 – by then people are exhausted.
9. Take into consideration equipment changes and the time this requires.
10. Ensure your program is diverse and reflects opinions from more than one culture.
11. Remember to include beverage breaks for training programs (at least 2) throughout the day. The time allocated is 15 – 30 minutes.
12. Indicate the registration times as well as the start and finish times.
13. Allow enough time for equipment changes between speakers.
DINNER, LUNCHES AND WALK AND TALK PROGRAMS

When designing an invitation program ensure the following:

1. That there is a clearly defined topic/theme.
2. Strap line is included.
3. Description of the event in one paragraph – something that sets the tone for what will follow at the event. You only want to give a hint.
4. Purpose for why person needs to be there.
5. Logistical details.
6. RSVP information – a call for action. Let people know what you expect them to do and by when.
7. Any other information can appear on a separate document as a loose attachment.
8. Dinners will require at least 60 – 90 minutes for dinner to be served, eaten and cleared. For training events 45 – 60 minutes is sufficient.

CONSIDER THE FOLLOWING:
Number of guests to seat?
Arrival time of guests
Do they have to register?
Are there welcome beverages? If so, allocate duration.
Duration for ushering?
Speaker topics.

**CONTENT DESIGN**

*Content design* is the presentation of information for a purpose to an audience through a channel in a form. The definition has five components: information, purpose, audience, form, and channel. The key to successful communication is explicitly identifying and optimizing each of the individual elements.

1. **Information:** What ideas are you sending out? This tends to be consistent across forms because it is anchored by messaging. Information, as we define it here, is the combination of the most important ideas audience needs to know and the key details (evidence, explanations and examples) that support those ideas.
2. **Purpose:** Why are we doing this? What do we want our audience to think/do/feel? Content is most successful when we design it to achieve a specific goal. Stating this goal explicitly enhances the development of content that resonates with your audience.
3. **Audience:** Who is our intended consumer for this content? Too often we create content without fully considering our audience. Explicitly identify the people you want to reach, their concerns, and their questions. This is where relevance and resonance meet. The design component refers to Presentations, Videography, Photography, Graphics, Logos, and Pictures and Written Text etc. Anything that culminates or forms this part of design.
CONSIDER HOW CONTENT CAN BE LINKED TO THEME:
Presentations.
Videography.
Photography.
Voice overs.
Graphics.
Logos.
Pictures and written text.
PowerPoint presentations.
Speeches.
Marketing.

CONTENT REQUIREMENTS

Photography: How can you combine your theme into this is?
Videography: How can you combine your theme into this is?
Presentations: Message linked to theme.
Video Footage: Linked to theme.
Music/Sound: Linked to theme.
Animations: Linked to theme.
Show Reel: Tell the story of the theme.
Theme Video: Set the scene for theme.
Copywriting: Linked to message.
Voice Overs: Linked to theme.

INVITATION DESIGN

OVERVIEW

Refers to the layout of the invitation body; the tone and concept development through visuals, typography, message; theme depiction; logos; colours etc.

Consider the following:
Body of the invite.
Tone/concept.
Message hook.
Who is invitation going to?
Where will they receive it?
When will they receive it?
What type of invitation?
Formality of event.
Font type.
Font size.
Colours.
Heading.
Strapline.
Layout.
Invitations are essential parts of many events. For small, personal or closed events, where only a specific number of people are invited to attend, invitations are a must. Invitations are typically chosen through a printing service, require postage for mailing, and require willing staff to stuff and address the envelopes. With today’s casual attitudes and instantaneous Internet connectivity, such a formal request as an invitation automatically sets an event above the ordinary. A sense of exclusivity is commonly attached to the receipt of a written invitation, making it a powerful tool for gathering top-notch executives, powerful financiers, or noted academicians to industry events, political gatherings, new product releases or high-profile think-tank gatherings.

Invitations fall within the realm of the commercial printer. Selection of quality papers, distinctive fonts, properly sized envelopes and RSVP cards for return remittance compromise the classic invitation. Just as importantly, the tone of the invitation, the words used to express the invitation and the times and location of the event must be obtained before the invitations are ordered, that printing and processing may be completed in a timely fashion.

Invitations are commonly distributed at least 3 weeks prior to an event, and if more time is necessary, determined by the size and scope of the event, they may be sent to recipients even earlier. Printing likewise takes time, and if it is part of the promotional process for the event, the invitations become one of the earliest details to attend to, once the venue and timeline of the event are established.

For political, religious and business-related gatherings, the invitation may be included in a mailing with a newsletter or other information, such as brochures, or include prompts to encourage a remission of monies for reserving lodging, transportation, or banquet attendance. There may also be options presented for participating in special events related to, but not part of, the main event, such as the dedication of monuments, buildings, or the opening of new businesses.

Invitations express a profound intimacy as it relates to the event and the guests involved. Invitations not only convey a sense of special regard for the invited, but they also impart a sense of dignity and charm to the event. Invitations likewise suggest opulence befitting important, formal, and celebratory affairs. Invitations may vary from very casual (e.g. a telephone call inviting you to an afternoon tea) to very formal e.g. a written invitation to a gala event such as the Company Awards Evening. Invitations must be sent out timeously.

**WRITING INVITATIONS**

The information that appears on an invitation forms part of the program. When writing your invitation remember that people will only want to attend your event if it sounds interesting and exciting.
**Venue:** Include directions or a map to your event venue. Transport details such as the closest bus route, train station and parking etc. are useful.

**Time:** Include starting and finishing times. If you have set times for speakers, you might write up a small program (this is particularly useful for the media - you don't want them coming to an event and finding they have missed the guest speaker).

**Contacts:** Include contact numbers so people can get in touch if necessary. If the event is not at your usual place of business, try to include a mobile phone number on the invitation.

**RSVPs:** RSVPs are necessary for catering and/or seating arrangements. Have participants’ contact you before the big day by phone, fax, mail or e-mail. If they have not contacted you close to the date, give them a call to confirm attendance (this is particularly important for prominent members of the community).

**Salutations:** Make sure you get spelling and titles right on the invitations. If you are unsure about a person’s name or title, phone them in advance to clarify.

**Dress Code:** It can be embarrassing for someone to arrive at an event or function either over or underdressed, so it is important to include a note about what is expected (e.g. casual, after 5, black tie etc.).

Invitations should be issued in a manner that should plainly inform you as to whether your company is requested or if you may bring a guest. If a formal invitation is issued “…for the presence of your company…” and does not further indicate that you may bring a guest, you should assume that the invitation is for one. It is poor taste to contact the host/hostess and “hint” for approval to bring a guest.

Often when the invitation is for a small party or a large food function, there will be space or price considerations to be dealt with and limitations must be imposed by the host/hostess. It puts the invited party in an awkward situation to say the least. Whenever put in this position, they must either continually increase the number of invited guests or decide to stick to the original list and risks having the guest opt not to attend.

**RSVPS: RESPONDEZ S’IL VOUS PLAIT – PLEASE REPLY.**

Before arranging the seating plan the event organiser will need to know how many guests will be in attendance. Typically RSVPs must be received at least a month before the event. Include a date by which people must reply; otherwise some people may decide to leave it to the day before the event. Chase up stragglers with a phone call once the reply deadline has expired.

**SAVE THE DATE**

The sooner guests can be notified, the better. If the event organiser has ample time that is several months away, consider sending a Save the Date card. This is simply a notice to your guest list that you are planning an event for that date and to mark their calendars so they’ll be ready when the details follow by invitation closer to the event date when the details have been finalized. Save the Date invites are almost a necessity for events taking place on holiday weekends, events that will require out of town travel for guests.
MARKETING STRATEGY

Covered in this section:

Marketing Management
Invitation Management
Materials Management
Merchandise Management
Promotions Management
Public Relations Management
**MARKETING DEFINED**

*Marketing* is a customer-focused business discipline that is interested in providing customer satisfaction and influencing decisions about the purchase of goods, services, ideas and causes. Too many people, however it means various things – advertising, selling, or promotion, to name a few.

According to the American Marketing Association marketing is the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisational goals.

The marketer in an organisation is responsible for all of the tasks in the above mentioned definition. The definition refers to conception, pricing, promotion and distribution. There are referred to as the four P’s: product, place, promotion and price. *Product* is the idea, goods or services being offered, *place* refers to how the product or service will be delivered to the consumer, *promotion* refers to how the organisation will communicate with the customer, and *price* represents what the customer will provide in exchange for the product or service.

**WHAT EVENT MARKETERS DO**

Simply put, the event marketer needs to be able to manipulate the variables in the marketing mix (the four P’s) in order to gain strategic advantages over competitors. Regularly, these activities will involve environmental analysis, internal analysis, and thorough understanding of the objectives and goals of the event organiser.

**THE IMPACT OF EVENTS**

When done well, events have the power to create a lasting and powerful positive impression of all that your company can deliver. By allowing people to experience and interact with your company, product or service while participating in an event, you are connecting with potential buyers. It’s no wonder most companies include event marketing as part of their overall marketing mix. According to the 2012 IDC Tech Marketing Benchmarks Study, on average event marketing, on average event marketing constitutes 1/5 of the marketing budget, a pretty sizeable percentage.

**HOW IS AN EVENT MARKETING PLAN DEVELOPED AND EMPLOYED?**

*Event marketing* is unique because each event must be approached differently – in this respect, a marketing team doesn’t necessarily need an overarching “plan” for their various events. Instead, it is important to base each individual event marketing tactic upon the brand’s overall marketing plan and how it fits into the personality of the event. By approaching each event as a separate chance to make an impression, a brand can tailor their efforts to best impact each audience.
Still, teams must consider three aspects when developing an event marketing plan.

- First, the company should consider the **personality that their brand** is trying to convey. A brand like Coca-Cola, who has historically tried to place their product as a harbinger of global peace, happiness, and simple pleasure, made an excellent choice by installing vending machines that dispensed “happiness” along with soft beverages.

- Second, company must **keep their target audiences in mind**. In recent years, grassroots efforts by men’s health coalitions have popularized “Movember,” a November-long moustache-growing contest to raise awareness of prostate cancer and other cancers affecting men. This initiative would never have taken hold if not for the ironic popularity of moustaches among young men, the audience who could most benefit from men’s cancer awareness.

- Third, companies need to **consider what lasting impression** they wish to leave on their audience. Many people remember the 2005 Sony campaign where the company dropped – and filmed – 250,000 bouncy balls on the streets of San Francisco in order to advertise the colour display their new Bravia LCD television was capable of.

Brands can impress event crowds through a variety of creative tactics, not just sheer visual appeal. For example, one tactic that brands use is to create an event within an event. The idea is to create a compelling reason for patrons to stop and explore your brand, not just another booth for them to walk past. At the Sundance film festival, Ray Ban sunglasses put on a truth-or-dare themed campaign, which was fun for participants and also translated into social media shares after the event was over.

Event marketing can also be much more subtle – many companies use QR codes on their posters and branding materials that work to integrate physical and virtual branding. These QR codes can lead users to mobile sites offering discounts and special offers on physical products. Additionally, some companies offer exclusive event benefit coupons to those who ‘like’ them on Facebook.

In today’s buyer-empowered world, marketers need to seize every opportunity to start a relationship, generate goodwill, and earn the trust of prospective buyers. It’s tempting to want to stick with marketing tactics that take the least amount of time and money to execute. But it’s often not in your company’s best interests to do so. A solid marketing mix that incorporates event marketing is critical to connecting with as many potential customers as possible.

Every business seeks to stand out from their competition, and event marketing can help you do just that. Whether you are hosting a small webinar, a large-scale international tradeshow, or an executive-level private function, event marketing needs to be an integral part of the demand generation mix. After all, a strategic combination of online and offline marketing is essential to any company’s bottom line. The modern consumer wants more than a pitch when evaluating solutions or making a purchasing decision. Events offer a unique opportunity for them to interact with solution providers to get a first-hand sense of a company’s focus, perspective, and personality.
People like to go to the Apple store because they can talk to a human and experience the products in person, then go online to purchase. And if most of your company’s marketing and presence is online, hosting events enables your company to make those connections.

But one thing is non-negotiable: **events must be memorable to make an impact.** Of course, the desired impact depends on your goals. But most companies want events to be more than just a staged advertisement for their brand.

### MARKETING STRATEGY

Developing and implementing an *integrated marketing strategy* will optimize the quality and quantity of participants for your meeting.

The marketing campaign will describe your meeting/event and the benefits that each attendee will receive by paying the registration fees and attending. The Four Ps of any marketing campaign are product – your education or event; price – registration fees and in the attendees’ minds includes travel and hotel; place – where they can find the information; and the promotion – the communication of the benefits of attending.

- **Promotion** is the communications tool of the marketing strategy. This aspect of marketing aligns with the benefits or the meeting objectives.
- **Promotional strategies** encompass direct mail, advertising, exhibiting at related trade shows, promotional materials, electronic marketing (e – marketing), and meeting and event websites.
- **Publicity** refers to promotion in appropriate media and encompasses all aspects of press relations.

The first step in marketing your event/meeting is to understand exactly what you are going to market. The key message points will be the first item developed to incorporate in to an overall marketing strategy to reach your target audience.

- **Identification:** Target audiences are groups to which you are directing your marketing efforts. Identification refers to not only determining who the meeting’s audiences should be, but also identifying the key objectives of each audience that attending your event will answer. Use market research to assist in identifying information about your market place.
- **Segmentation:** Target audiences can be identified and segmented by the criteria and results of your surveys and information gathering. Understanding the different motivations of the groups of attendees will help to determine what the meeting/conference should look like and will determine what avenue to take when promoting the event. Engineers do not communicate in the same way that sales people do. Also, different generations want different information, communicated and presented in different ways.
Dividing marketing into segments allows a marketer to decide on methods of communicating with a specific target group and of tailoring a product to a particular target group. The market can be segmented into geographic (by region, country, town); demographic (by age, gender, ethnicity etc.); psychographic (a person’s psychological characteristics, including attitudes, beliefs and lifestyles); and behaviours (such as hobbies, shopping habits and means of transport). Ideally, these four basic methods should be used in combination.

→ **Interaction**: People are no longer interested in static content. Engage the audience in the message, and they will be more likely to retain it and act positively.

→ **Integration**: Although the content of the message developed must be customised for each of the target audiences, the overall theme and identity of the meeting should remain the same. Make sure that messages are consistent and that the event has a brand identity that remains constant. Incorporating a theme and logo specific to the event and making sure that all communications promote this theme is one way of ensuring integration. A tag line that describes the overall goal or mission of the event is another way to go.

→ **Differentiation**: The cornerstone of the marketing strategy is what makes the event different? The event must have a consistent, simple message, must deliver on the promise of the marketing message and must be focused if it is to be successful.

**Also Consider the Marketing WHs:**

- **Why?**
  - Benefits of event? Use personal approach and wording. Appeal to needs.

- **Who?**
  - National, regional, state, local, audience?
  - Disciplines and interests of audience?
  - Audience awareness of nature of event?
  - Level of experience (novice to expert)?
  - Generations?

- **When?**
  - Market schedules/patterns?
  - Time of day to market?
  - Day (s) of week to market?
  - Time of year (seasonality)?

- **Where?**
  - Uniqueness of venue.
  - Convenience.
  - Travel accessibility.
  - Availability of local support.

- **What?**
  - Explain purpose of event.
  - Determine and create expectations.
  - Prioritize and identify program features.
  - Review the “who?” principles.
ATTRACTING THE RIGHT AUDIENCE

The biggest challenge is to attract the right audience and to get desired attendance rates so that you can disseminate your message. There is no use having a room filled with the wrong people who cannot buy into your brand message.” The aim of event marketing is to provide entertainment, excitement and enterprise. These are the three “Es” of event marketing.

→ **Entertainment:** Competing against a saturated environment with convenient home entertainment, TV, CDs, PlayStations has made getting people to events more difficult. The key to marketing success is the need to provide entertainment that will once again compel audience to leave home to experience something they will not find anywhere else. What you are offering needs to be different, unique and designed just for them.

→ **Excitement:** Seems intangible, but it is real. The key to making an event memorable. Excitement is generated by entertainment that ‘blows the doors of the place’. It must be innovative, related to the key event message and brand appropriate.

→ **Enterprise:** Offering people the opportunity to experience something first before anyone else. Allow people to experience something new; be the first to be able to describe those new experiences to friends and become part of the inner sanctum of the new enterprise.

EVENT MARKETING ROI

**ROI (Return on Investment)** is not just something to consider after the event; the event organiser must plan for ROI from the outset and continue measuring ROI after the event. Because events can result in numerous outcomes, one will likely need to measure – and improve upon – many areas. This very fact can make it tricky to measure the ROI of events since they serve multiple purposes such as lead generation, pipeline acceleration, deepening customer relationships, etc. Determine which goals are trying to achieve.

MARKETING PLAN

A **marketing plan** is a systematic analysis of an organisations resources, competitors, markets and best practices to reach and influence the markets. For an event organisation, a marketing plan should embody its intentions for competing successfully in the marketplace, and ultimately produce tangible results in terms of increased spectators, sales, net revenue and/or market share.

A marketer for an event or other organisation will generally be involved in the development of a marketing strategy. This will require him or her to manipulate the variables in the marketing mix in order to gain strategic advantages over competitors. He or she might also find it necessary to focus specifically on one element of the marketing mix (called an element strategy) in order to gain that advantage. Alternatively, the marketer might have to make a specific decision as to whether or not to build, harvest or divest with regard to a specific brand or event.
The Marketing Domain addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. The nature of the event as an “experience” necessitates a thorough understanding of the unique buyer-seller relationship associated with this intangible product. This domain deals with the development and management of invitations, merchandise, promotions, public relations and sponsorship opportunities.

THE SIX PS OF EVENT MARKETING

The marketing campaign will describe the meeting/event and the marvelous benefits that each attendee will receive by paying the registration fees and attending.

The Four P’s of any marketing campaign are product – your education or event; price – registration fees and in the attendee’s minds includes travel and hotel; place – where they can find the information; and the promotion – the communication of the benefit of attending.

There Are Four P’s Of Marketing

1. Product
2. Price
3. Place
4. Promotion

PRODUCT

Successful salespeople have both expert product knowledge and effective sales skills. Expert product knowledge is essential in today’s competitive environment. More important than sales skills, demonstrated product expertise shows the client that he or she is making a purchase that has added value and helps to develop confidence, as well as long – term loyalty. Every event product combines history, quality and value to produce a unique program.

How can you manipulate this to attract more people?

PROMOTION

You may have the best – quality event product, but unless you have a strategic plan for promoting this product, it will remain the best – kept secret in the world. Even large, well – known mega – events such as the Super Bowl and Olympic Games require well – developed promotion strategies to achieve the success they require.

Promotion is a necessity for any event as the means of informing interested people that an event will take place. Promotion requires a focused application of organisation, branding and outreach, and is dependent upon defining an interested demography. Proper promotion also relies on correct information about the event and the event sponsors. Since promotion is the domain of the marketing expert, the event must provide a distinct benefit that makes people want to attend,
that marketing efforts may promise, with reasonable surety, a large enough audience to make the event a success.

Promotion cannot be overlooked when planning an event that appeals to a diverse audience gathering together for a common interest. Attracting attention prior to the event is invaluable for bolstering ticket sales, increasing interest in a cause, or highlighting accomplishments. Promotion requires the use of advertising for stimulating the interest of the target demographic, by arranging appearances for event spokespersons on talk shows and radio programs, or by circulating information at related industry events or through other media.

Promotion also takes the Internet stage, providing web sites, or links to web sites relating to the event, industry or cause. Attention is paid to writing press releases, optimizing search engine content, and spreading the word through social media.

Promotional tasks might also include writing blogs or conducting email programs to pave the way for subsequent information gathering by prospective guests. Not to be overlooked are the writing talents needed for developing direct-mail materials and invitations, as well as printing resources for the production of posters, fliers or brochures. In some instances, retaining event promotion personnel to distribute promotional materials at festivals or to staff booths at other events, offer keys to opening additional doors of interest in an upcoming event.

Good promotion imparts a sense of anticipation about an event. Often, to accomplish this, promotions revolve around a chosen theme that becomes the springboard for the entire event, affecting the choice of music, colour, décor, food and even the dress of event participants. Effective promotion brings with it the energy of enticement, is the harbinger of excitement, and offers a promise of things to come.

When putting so much time and energy into planning your event, you want to make sure that you do the promotion right. To generate the highest amount of registrants, you need a mix of email, social, public relations, and other types of paid promotions to get the biggest bang for your buck.

By communicating with your audience early and often leading up to the event, you will have a better turnout as your event will be top of mind for your attendees. Just like lead nurturing, successful event promotion will consist of a series of touches that may include press releases, emails, direct mail, and call downs.

Remember to take into consideration what sort of event you are hosting when determining the promotional tactics that will draw in prospects or customers. Promotions for webinars and online events will often rely on emails, while those for offline events may take a multi-touch approach.

Here is a checklist that will assist you with identifying and budgeting for your event promotion:

• Identify all event elements that require promotion from the proposal through the final evaluation.
• Develop strategies for allocating scarce event promotion resources with efficient methods.
• Identify promotion partners to share costs.
• Target your promotion carefully to those market segments that will support your event.
• Measure and analyse your promotion efforts throughout the campaign to make corrections as required.

The promotion strategy you identify for your event requires a careful study of past or comparable efforts, expert guidance from people who have specific expertise in this field, and, most important, benchmarks for specific measurement of your individual promotion activities.

There are many ways to measure promotion efforts. First, you may measure awareness by your target market. Anticipation of the event may be tantamount to ultimate participation. Next, you may measure actual attendance and the resulting investment. Finally, you may measure the post-event attitudes of the event promotional activity. Did the promotions you designed persuade the participants or guests to attend the event?

Promotion is the engine that drives the awareness of your event. Most event marketers use a variety of media to promote their products. However, it is essential that Event organisers carefully select those media outlets that will precisely target the market segments that are appropriate for their events. Targeting promotion strategies is essential to ensure the alignment of the event’s attributes with the needs, wants, and desires of potential attendees.

PRICE

Market research will help you determine price. Part of the market research will include conducting a competitive analysis study of other organisations offering similar event products. You may initially believe that your product is uniquely different from every other event. However, when you interview potential ticket buyers or guests, you may be surprised to learn that they consider your event similar to many others. Therefore, you must carefully list all competing events and the prices being charged to help you determine the appropriate price for your event.

Typically two factors determine price. The first is what is the financial of the event? Is it for profit or not – for – profit or is it to break even? The second factor is the perceived competition from similar events. If your event ticket costs R100 and does not offer the same perceived value as a similar event selling at R50, you prospective guests are more likely to select the latter event.

PUBLIC RELATIONS

Advertising is what you say about the event, whereas public relations are what others (their perceptions) are saying about your events. Since many events require a second – party endorsement or even review to encourage people to attend, public relations is significantly more valuable and effective than traditional advertising.
Today, public relations are at least equal to and in, many cases, even more important than traditional advertising. However, public relations involve much more than merely grinding out a short press release.

The effective event public relations campaign will involve research with event consumers as well as the media; the development of collateral materials such as media kits, fact sheets; and other tangibles; the organisation and implementation of media conferences; the development of a speaker’s bureau; on-site media relations assistance at the event.

Event public relations help create the overall impression that others will develop about your event. In that regard, it is significantly more valuable than advertising because it implies greater credibility.

**PUBLIC RELATIONS CHECKLIST**

- Disaster recovery.
- Disaster response.
- Media.
- Media contact list.
- Media kits.
- Media releases.
- Photo opportunities.
- Publication articles.
- Requests for coverage.

**PLACE**

In real estate, location is everything. In event marketing, distribution of your product may be everything as well. The location of your event often determines the channels of distribution. If your event is located in a rural area, it may be difficult not only to promote the event due to limited media resources, but also for your target market to make the purchase due to logistical restraints.

The event organiser must consider place when designing the marketing program for the event. Place not only implies the taste or style of the event, it also, in large part, defines the type of person that will be persuaded to invest in the event.

According to Leonard H. Hoyle, Jr., in his book Event Marketing (Wiley 2002), there is an additional “P” that is critical to the marketing mix and that is positioning. He says, “Positioning is the strategy of determining through intuition, research, and evaluation those areas of consumer need that your event can fulfill.” He further states that the five key considerations when positioning an event include location, attention span, competitive costs, the program, and simplicity of the marketing plan. The program must be something that no one else can offer. Finally, the most important variable of all may be the plan itself. Keep it short and sweet and easy to track.

**MARKETING MANAGEMENT PLAN CHECKLIST**

216
1. DISCOVERY MARKETING REQUIREMENTS
Will client require a marketing plan?
Branding requirements.
Customer needs/benefits.
Customer intelligence.
Customer relationship.
Demographics.
Differentiation.
Mailing list/database.
Objectives.
Research.
Medium.
Messages.
Positioning.
ROI evaluation.
Schedule.
Marketing strategy.
Marketing objectives.
Marketing activity required * for example print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.
When will invitation go out?
Who will invitation go to?
Marketing personnel.

2. MARKET RESEARCH
Preliminary marketing plan research.
Research materials.
Research merchandise.
Research promotions.
Research PR.
Research sponsorships.
Research marketing activities.
Conduct marketing SWOT analysis.
Research marketing costing.
Ensure business objectives are smart.
Research marketing timing.
Research marketing personnel.

3. MARKETING PROPOSAL

4. CONFIRMATION OF MARKETING PLAN
Confirmed preliminary marketing plan.
Confirm market.
Confirm business objectives.
Confirm key strategies.
Confirmed marketing budget.
Confirmed marketing timing.
Confirmed marketing personnel.

5. MARKETING and PROMOTIONS PLAN
Marketing plan.
Roles, responsibilities of marketing personnel.
Role of promotions.
Role of PR.
Role of sponsors.
Marketing costing.
Marketing timings for all involved.

6. APPROVAL OF MARKETING PLAN
Approved marketing plan.

7. MARKETING MANAGEMENT
Marketing plan implemented.
Materials management.
Merchandising management.
Promotions management.
Public relations management.
Sponsorship management.
Implementation of marketing plan before event.

8. THE EVENT
Management of marketing areas e.g. materials, sponsorships, merchandising.

9. CLOSURE
Evaluation of marketing plan.

MARKETING USING INVITATIONS

COMPILING AND CONTROLLING GUEST LISTS AND NUMBERS

- Start by deciding which guests need to be invited and what the maximum number of people will be.
- Then compile an A, B and C list. Send out the invitation to the first list with a deadline RSVP date. If people do not respond by that date you can then send the invitation to the B list etc.
- Most event organisers make use of Excel spreadsheets. They capture information such as the guests name, surname, contact details including email addresses and any special meal requirements. As the guests confirm the planner then ticks off whether the guest has:
  - Confirmed.
  - Declined.
  - Cancelled.
- There may also be formula added to calculate the confirmed numbers and the declined numbers.
- Predicting confirmation numbers: You will need to predict the number of guests you anticipate coming. This needs to be based on past history and the planner’s experience. Always allow for at least a 5 – 15% cancellation rate and about 2- 5% no shows on the day of the event.
- The planner will need to base this on experience and past history.
- Display guest list in alphabetical order with table numbers or fun thematic names.
• Programs with the layout of the room can be placed at entrance or given out to all guests as they enter.
• Use seating software to produce this for you.
• Can be updated quickly if any changes.
• Include a few extra seats for people who bring guests/unforeseen people.
• The planner will need to capture information on special meal requirements.

• **No Shows:** When guest RSVP but have no intention of attending, it is not just rude but it has a financial implication on the company hosting the event. Last – minute crises do happen, but as some industry events the percentage of no – show guests who have called in to say they will not be attending, don’t call and cancel, or merely don’t show up is very high. By that stage food and beverages have been paid for. Sometimes the inability to decline the invitation in advance is driven by good intentions but results in poor execution. You may want to call the non-show guest after the event just to confirm if they are ok. By calling them (in a polite way) to find out if they were ok they will see that the company valued them being at the event. They will be unlikely to do this again in the future. Please do remember not to be threatening but to call and use a tone of concern.

• **Unexpected Guests:** Guests may show up unexpectedly, deciding at the last moment to attend. They have called and sent their regrets, but on the day of the event they decide to come. Planners know that this ripple effect of unexpected guests can cause a seating plan nightmare. You can decide how you would like to handle this. You can provide an extra contingency table at the event for unexpected guests or you could decide not to let them in. The decision is one that you really need to think about and decide whether this person is someone that you need at your event and what would the consequence be if they are not allowed in. Planners generally try to handle this awkward situation with grace, but a gracious guest does not put their host on the spot or in a position of having to incur unexpected expenses on their behalf.

• **Substitute Guests:** Before you prepare your invitation you need to consider whether the invitation can be passed on to someone else. If it can be, please include this on the invitation that is going to be sent out.

• **Late Comers:** You need to decide for yourself how you would handle this and what your policies are on this. If it is a conference and there would be minimal disruptions then it would be already to let the latecomers in – on the condition that the event is not being video recorded and the main keynote is not in the middle of the presentation. At gala dinners or formal events doors should be shut once the program begins.

**INVITATION MANAGEMENT CHECKLIST**

1. **INVITATION DISCOVERY**
   Consider client’s requirements from client interview.
   Objectives.
   Purpose of event.

2. **INVITATION RESEARCH**
   Research date of event.
   Ensure no conflicting competitor events.
   Research best email subject line for invitation.
Research best graphics/images.
Research best text and wording.

3. PROPOSED INVITATION

4. CONFIRMATION OF INVITATION PLAN
Confirm all invite plan areas with client.

5. INVITATION PLAN
Who will design invite?
Who will send out invite?
How will invite be sent out?
When will invite be sent out?
Develop an RSVP numbers/confirmed/declined schedule.
Management of special requirements.

6. APPROVAL OF INVITATION
Client to approve any changes to invite.

7. INVITATION MANAGEMENT
Sending out invite.
Manage responses.

9. CLOSURE
Evaluation of invitation response rate.
Evaluation of RSVP confirmations.
Evaluation of attendance.

INVITATION CONSIDERATIONS
- Reviewing date, location, RSVP, dress code for event invitation.
- Invitee list.
- Save the date – date, day, time invite is to be sent.
- Invitation: date, day, time invite is to be sent.
- Confirmation email: day, time to be sent.
- Confirmation sms day, time to be sent.
- Content management of invitation (graphics, text, colour, tone etc.).
- Theme and concept.
- Program timings.
- Invitee titles to be used.
- Consider naming of partners/plus one.
- Who will send out invitation?
- What system will be used?
- How will responses be handled?
- RSVP process and confirmation.
- Special requirements.

LOGISTICS
TIME MANAGEMENT CONSIDERATIONS
Paid for event.
Complimentary.
Mandatory.
Procurement process.
RSVP SCHEDULE

HOW TO USE RSVP SCHEDULE

In order to manage RSVPS it is crucial to have an RSVP Schedule. This is used to track when the invitation will be sent, when the RSVPS are due, when your final numbers need to be confirmed with the venue, and any other important information relating to invitee numbers. This tool is used to manage time to ensure that you are in control of the total number of invitees invited to the event so that you do not miss critical deadline dates, and so you can react should numbers not be sufficient. You can then move onto a “B or C” invitee list.

To develop an RSVP schedule follow these steps:

**Step 1:** Copy and import the calendar you require from Outlook. Then insert it into this section. This has already been done here. Break it down into number of weeks.

**Step 2:** Insert the **date the event starts**. * Click and drag the Red Box to date.

**Step 3:** Insert **venue deadline dates** (final payments/final no.). Then work backwards. * Click and drag the Pink Box and insert it where necessary.

**Step 3:** Insert **date invite is going out**. * Click and drag the Orange Box and insert it where necessary.

**Step 4:** Consider the **total no. of pax. to be invited to the event**. Then consider your invite response rate and work accordingly. Indicate daily/weekly the number of responses required.

**Step 5:** Monitor this schedule/chart daily, weekly, monthly (as needed).

---

In practice here is an example…

**Event:** Breakfast Session

**Date:** 31st of the month. 6 weeks from current date.

**RSVP Target:** 50 people

**RSVP Invitee List:** 100 people

**Step 1:** Copy and import the calendar you require from Outlook. Then insert it into this section.

**Step 2:** Insert the **date the event starts**. * Click and drag the Red Box to 31st of the month.

**Step 3, 4 and 5:** Insert **venue deadline dates** (final payments/final no.) for example 21st of the month. The venues terms and conditions with regards to final numbers; number of guests you have booked for, and what the minimum number of guests are that your booking requires will determine how many confirmed RSVPS you will require and by when. If say, the venue requires a minimum of 35 people for your booking you will require **35 RSVPS before the 21st of the month**. It can then be determined that the invite will go out on the 3rd of the month for the following reasons:

- In our experience for breakfast sessions invitees prepare to only confirm closer to the time when they know what their availability is.

- We may not have been given ample time to plan this event as it was finalised last minute therefore we did not have enough time to send the invite out.

Therefore we would only have 14 working days from the day we sent out the invite (if sending on the 3rd of the Month). We would therefore take 35 pax. and divide that by 14 days = 2.5 (meaning we would need 2.5 RSVP confirmations every day or 12.5 RSVPS per week. If by the 20th of the
month you do not have 35 RSVPS confirmed you would need to make a decision as to whether to go ahead or cancel/postpone. You would need to consider the viability of reaching your target.

You will need to play around with this to ensure that you have sufficient time to:
- Send out the invitation and get the number of responses required.
- Evaluate what your target pax. is per day/per week/per month.

### RSVP SCHEDULE

<table>
<thead>
<tr>
<th></th>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
<th>SATURDAY</th>
<th>SUNDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEEK 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>WEEK 2</td>
<td>Invite</td>
<td>Sent</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Target:</td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>WEEK 3</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>Target:</td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>WEEK 4</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>Revps</td>
<td>Due: Min</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>35</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Final</td>
<td>Pax.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>22</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>23</td>
</tr>
<tr>
<td>WEEK 5</td>
<td>24</td>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td>WEEK 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Event</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

|        |            |          |           |          |        |

### SMART MARKETING TIPS

**Five Steps to Grabbing Your Reader’s Attention:**

- Use plain words – these are easy to understand.
- Point upfront – the point of the document is evident right away (use the upside down pyramid approach.
- Descriptive headlines – these allow you to catch key points at a glance.
- Clean, airy layout – This makes your text standout.
- Short sentences – They are easy to process.

**Make Your Point Upfront:**

- Don’t bury the message in a distant paragraph your reader is unlikely to reach.
- Big picture first, detail afterwards.
- Summary shows general direction.
- Conclusion at the front, not the end.

**Use A Clean, Airy Layout:**

- Good layout pulls the reader in.
- Use lots of white space.
- Choose the right font.
• Use capitals sparingly.

**Use Descriptive Headlines:**
• Text without headlines is a pain.
• Make your headlines descriptive.
• Introduction and other empty headlines – people know it is the introduction you don’t need to tell them.
• Ensure headlines are not redundant and pointless.

**Use Plan, Everyday Words:**
• Simple is best.
• Avoid long winded expressions.
  – *Prior to instead of before.*
  – *Subsequent to instead of after.*
• Avoid redundant qualifiers.
  – *Foreign imports instead of imports.*
  – *Joint agreement instead of agreement.*
  – *Advance notice instead of notice.*

**Use Short Sentences:**
• Don’t pad the start of your sentence – offer short sentences.
• Ensure grammar and spellings are correct.
• Use line spaces between paragraphs.
• Avoid redundant words.
  – *Long: The information that we currently have at our disposal.*
  – *Better: The information we have.*
  – *Even better: Our information.*

**The Power of Words:**
• Effective email subject lines.
• Who the email is from is important – determines whether reader opens email.
• Always use same ‘from’ address.
• Send from company brand or name.
• Will foster recognition and encourage response.
• Subject line information – keep it short and sweet.
• Max of 8 – 10 words (anything more than 60 characters will be cut off).
• Personalize emails.
• Intrigue readers – provoking opening message.
• Calls for action “Don’t forget to register by Friday!”
• Hooks. Subject lines such as "It's headed your way …" can be irresistible because readers must open the message in order to understand it fully.
EFFECTIVE EMAIL SUBJECT LINES

How can I create an effective e-mail subject line?
Answer: Oddly enough, the first step toward creating an effective e-mail subject line is to have an effective "from" line. That's because recipients overwhelmingly take into account who is sending them e-mail before considering the subject line and deciding whether to open the message.

To ensure recipients recognize your messages, always use the same "from" address, such as "janna@thehedgehogevent.com," and always send from your company name or brand. This will foster recognition and encourage response, as well as increase your chances of being added to recipients' e-mail address books or "white lists," which in turn can help deliverability. With an impeccable "from" field in place, you can create a sparkling subject line.

For effective subjects with zing, consider the four following key elements:

- **Branding.** Although brand isn't necessary to a great subject line, we recommend including your brand or product name as a way to increase recognition, match message content and build your long-term E-mail Brand Value.
- **Brevity.** People don't want to wade through long subject lines, so keep it short and sweet. Limit your subject line to a maximum of eight to 10 words. Keep in mind that anything more than 60 characters will get cut off, potentially discouraging readers from opening your e-mail.
- **Personalization.** Using names in a meaningful way can increase response.
- **Intrigue.** Entice recipients to open your messages by provoking a desire to learn more. Three ways to do this, alone or in combination, are to use:
  - **Calls to action.** Subject lines such as "MyConference.com: Don't forget to register by Friday!" tell recipients exactly what they need to do, and convey a sense of urgency.
  - **Value propositions.** "Save 20% on Event Workshops," spells out the benefit of opening the message.
  - **Hooks.** Subject lines such as "It's headed your way ..." can be irresistible because readers must open the message in order to understand it fully.
- **How can you be sure your subject lines are doing their job?** Test to find out. One easy method: Choose your top two contenders, send each to 10% of your list, and wait for results. Even a few hours will give you a good idea. All things being equal, the most effective subject line will elicit a higher response. Use your top performer for the remaining portion of your list.

**SUMMARY**

We didn’t say it would be easy, but, we said it once and we will continue to stand by it: done right, events are a worthy investment and a critical part of your marketing mix. After all, they offer a unique way to reach and engage with prospects and customers about your brand and offerings. While today’s buyers increasingly tune out commercials, avoid online advertisements, and delete promotional emails, events can get them fired up about who you are and how you can help them. With a well-planned and executed event, you can create a shared experience worth remembering.
OPERATIONS STRATEGY

COVERED IN THIS SECTION

Attendee Management
Brand Management
Catering Management
Communication Management
Content Management
Décor and Design Management
Entertainment Management
Housing Management
Infrastructure Management
Logistics Management
Site Management
Speaker Management
Technical Production Management
Way Finding Management

The Operations Domain concentrates on the people, products, equipment, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and manoeuvres associated with each. Impeccable coordination is required in order to manage this symphony (or cacophony) of logistical and functional requirements and expectations.
ATTENDEE MANAGEMENT

*Attendee management* addresses the development and/or procurement of suitable admittance credentialing and control systems such as registration, ticketing, and housing, as well as the tactics for facilitating proper movement and pedestrian traffic flow of the event crowds.

ADMISSIONS MANAGEMENT

AUTHORISING ACCESS – WHO’S WHO DETERMINES WHERE AND WHEN

Your accreditation system – establishing and issuing credentials – authorises access to your event and to specific areas at the event site. This means access to the individuals at the event as well, including the guests or attendees, suppliers etc. The type and scope of your system will be determined by the type and purpose of the event, as well as the need to control access to certain areas, people, activities, information, equipment, or materials.

Not everyone needs access to everything at all times. Those who set up the event do not necessarily need to be there during the event. Those who have received special access on a certain day are not necessarily authorised to be there at any time during the run of the event.

**Tip for Managing Access:**
Use colour coded name badges to identify different groups of people. One can also implement scanners and barcodes which can identify where people are allowed, access, food requirements etc.

ACCRREDITATION CHECKLIST

<table>
<thead>
<tr>
<th>CREDENTIALS</th>
<th>INDIVIDUALS</th>
<th>ACCESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Badge.</td>
<td>Delegates/Attendees.</td>
<td>All Access.</td>
</tr>
<tr>
<td>Laminate on Lanyard.</td>
<td>Participants.</td>
<td>Date/Time Span - Valid.</td>
</tr>
<tr>
<td>Logo Wear.</td>
<td>Media.</td>
<td>Exhibit Hall.</td>
</tr>
<tr>
<td>Name Tag.</td>
<td>Performers.</td>
<td>Locker/Dressing Rooms.</td>
</tr>
<tr>
<td>Personalised Badge.</td>
<td>Staff.</td>
<td>Production Areas.</td>
</tr>
<tr>
<td>Photo ID.</td>
<td>Volunteers.</td>
<td>Special Parking Areas.</td>
</tr>
<tr>
<td>Ribbon or Sash.</td>
<td>Concessionaires.</td>
<td>Staging/Storage Areas.</td>
</tr>
<tr>
<td>Smart Card.</td>
<td>VIPs.</td>
<td>VIP Hospitality Areas.</td>
</tr>
<tr>
<td>Wristband.</td>
<td>Workers.</td>
<td></td>
</tr>
</tbody>
</table>
**GIFT MANAGEMENT**

*Gift management* has become a huge part of events. Gift giving has grown in popularity as the means to promote an event, to sell tickets, to increase attendance, or to award attendees. It is not uncommon for gifts to be presented as the centerpiece of company holiday parties, and has become a popular way for businesses to promote products by supplying tax-deductible gift packages to celebrities or other spotlight personalities attending special events.

The giving of gifts can be made an integral part of the event itself. Gift giving is a method for honouring accomplishments, serving as a thank-you, given as favours commemorating an event, or provided to promote new products and services. In preparation, gifts must be purchased or pledged, stored until the event, wrapped accordingly, labeled for distribution, and secured in a place to be drawn from during the event, safe from loss, damage or vandalism.

Trophies, plaques, commemorative mugs, T-shirts, caps, printed totes and pens are among the most common gifts given to event attendees. Table centerpieces and floral arrangements might also be included in the list of gifts. For events that revolve around a particular company, jackets, tropical trips, tickets to amusement parks or gift certificates to popular stores might be in order. For companies introducing a new product line, samples might be attractively packaged and distributed, for guests to have a personal opportunity to try out the newly introduced products.

Certain events, particularly those relying on ticket sales, may offer extravagant vacations, boats, automobiles or even homes as an integral part of the promotional campaign used to entice individuals to purchase an event ticket. In this vein are also found the back-stage pass and invitations to celebrity band after-parties.

Tickets to an event may also be treated as gifts themselves; a popular promotional method employed by radio and television stations, local newspapers and related businesses to stir up excitement for an event. Opportunities to receive salon services and makeovers, special sessions with golf pros or even driving a race car are but a few of the exciting ways gifts can play a part in event promotion.

---

**GIFT MANAGEMENT CHECKLIST**

| Type of gift. |
| Value of gift. |
| No. of gifts. |
| Branding requirements. |
| Type of packaging. |
| Time frame/order complete. |
| Colour preferences. |
| Message type. |
| Message printing. |
| Gift allocation. |
Date order placed.
Vendor/supplier.
Courier/delivery costs.
Artwork sign off.
Logos sent.
How will gifts be handed out.
Gifts signed for.
Who will hand gifts out @ event.
Where will gifts be packaged?
When will gifts be packed?
Who will receive gifts?

OTHER ATTENDEE MANAGEMENT CONSIDERATIONS CHECKLIST

HOUSING MANAGEMENT
Early check in.
Later check out.
Porterage.
Luggage storage.
Special room requirements.
Smoking or non-smoking room.
Ground floor rooms.
Near/or away from lift.
Parking costs.
Incidentals management.
Blocks on rooms.
Guest credit card required for holding by hotel.
Disabilities.
Sharing or single room requirement.
Family room requirement.
Self-catering requirements.

LOGISTICS MANAGEMENT
Travel.
Transport .
Transfers.

QUEUE MANAGEMENT
Line Type: Snaked Line or Straight Line
Equipment Required: Stanchions etc.
Systems
Contingency Plan

REGISTRATION MANAGEMENT
Will there be registration? If so, process?
Personnel responsible for registration.
Last minute registrations.
Registration furniture.
Registration list/guest list.
Name tags.
Special meal requirement name tags.
Printing onsite.
Registration systems.
Registration process.
Payments.
Registration layout.
Protocol to follow.
Location where registration will take place.

SEATING MANAGEMENT
Seating systems/technology to be used.
Seating protocol.
Assigned seats.
Unassigned seats.
Assigned tables.
Unassigned tables.
Free seating.
Allocated by Ticket
Ushering Requirements
Ushering Personnel
Table Numbers
Row Numbers
Screens for Floor Plan and Seating Charts
Seating Protocols for Issues

SPECIAL REQUESTS
Special Meal Requests
Special Parking Reservation Requests
Disabilities

CATERING MANAGEMENT
Special Meal Requirements

CROWD MANAGEMENT: SEE RISK CHECKLIST
Arrival/Departure Modes
Crowd Management Plan
Group Movements
Guest Relations
Pedestrian Traffic Flow
Queue process

FLIGHT MANAGEMENT
Flight From
Flight To
Name, Surname on Passport
Copy of ID/Passport
Visas Required
Vaccinations Required
TRANSPORTATION STRATEGIES AND SOLUTIONS

Once the site is selected, it is the event organiser’s responsibility to identify travel options that are convenient and cost-effective for attendees. The ease of transportation to the event can affect attendee attitudes toward the entire event. Make sure transportation plans ease access to the event; allow ample time for attendees to arrive at the site; are communicated clearly, accurately, and well in advance; and are as economical as possible. Transportation requirements for an event will depend on the type and size of a particular event, the scope of the event organiser’s responsibilities and the impact the event will have on the surrounding community.

The transportation of goods and supplies to the event site must also be factored into the transportation plan. Such transport can involve anything from scheduling deliveries to shipping an entire fleet of cars etc.

For some events, the organiser is called upon to take into the account the requirements for travel to the event destination as well as the transportation requirements at the destination. Many air carriers and other transportation options offer group rates, complimentary tickets based on group sales volume, on board amenities, and assistance with bookings and manifests. The organiser must assess the travel and transportation requirements by identifying the likely needs of the general population of attendees, as well as the special transportation needs of VIPs, performers, and sponsors. The organiser must also take into consideration how the out-of-town attendees or guests will get about once they are at the destination.

Transportation to and from an event is within each guests’ responsibilities, but there are instances where providing transportation is a necessity. When individuals must arrive at a specific time for particular ceremonies, provided transportation reduces the possibilities of a late arrival, or worse, a no-show. Transportation also might be necessary to bring in a guest speaker to an event destination that is beyond the speaker’s comfortable driving range. Transportation is likewise necessary for covering very large events by key event organisers or security personnel. The lowly golf cart has found popularity for this purpose beyond the rolling hills of the golf course, adapting easily to indoor spaces.

Transportation arrangements also prove necessary for the delivery of products for displays, and materials for the construction of special areas. Any event detail requiring the arrival of goods, materials or people to the event, that is necessary to the event, must be weighed up and considered. Transportation of guests arriving at a transportation hub, such as an airport or train
terminal, requires transportation to their hotel rooms, or the event venue itself. Often, transportation is provided by hotel venues in which the guests will be staying as a service to hotel guests. If transportation is not a provided service, the assurances of public transportation, availability of taxis or proximity to rental car depots must be investigated.

Allotment of funds to cover transportation costs can be tricky to pin down. If rental vehicles are provided as a means of transporting key personnel to and from the event venue, the costs of fuel must also be included in the equation. Further, rental of items such as golf carts may require a fee for delivery of the carts, and trucks rented for the delivery of products and display materials must include the salaries of drivers retained to perform these functions.

Transportation costs can easily blossom without a definitive and structured plan. Taking the time to make a considerate approach to transportation needs in event planning is an absolute must. This requires anticipation of every detail, forecasting needs for transportation in order to arrive at a calculable and attainable event budget.

The following transportation factors need to be addressed:
- Where – how far away is the off – site location?
- When – what are the required arrival and departure times?
- How many people are being transported?
- Do they all need to arrive/depart at the same time?
- Will it be a single trip or continuous loop?
- Where will the buses stage (line up) for pickup and park when at the location?
- Where should vehicles arrive for pickup at both ends?
- Will the vehicles be accessible but secured during the event?
- Will the drivers need to be fed, housed etc.?
- Traffic impacts and implications.
- Routes to be taken.

Transport providers:
- Provide maps and directions.
- Send the pick-up and drop off schedule with all traveller details including contact numbers.
- Include car signage and airport collection signage (if needed).
- Check on air-conditioning facilities in vehicles.
- Availability of snacks and beverages for long trips.

**SUMMARY**

It is the event organiser’s responsibility to identify travel options that are convenient and cost – effective for attendees. Contracting travel and transport suppliers enables attendees to take advantage of lower group rates. It can also benefit the organisation by providing complimentary or reduced – price rates. Ground transportation is also an important responsibility. Choices include local rail and bus systems, airport service buses, hotel service vehicles, taxis, private limousines, and shuttle buses. When arranging for shuttle service between locations, determine how expenses
will be met, coordinate routes and times and choose a service provider carefully. Remember to communicate all transportation options to attendees.

**CATERING MANAGEMENT**

**INTRODUCTION**

Almost all events and meetings include some type of food and beverage service. It may be as basic as snacks and non-alcoholic beverages for a refreshment break, or as elaborate as an elegant six–course sit–down dinner for an awards banquet. Food and beverage, and the manner in which they are served, can help make the meeting more memorable and more productive.

Food and beverage functions should support the objectives of the meeting. If a company plans a 3–day training meeting, they will want attendees to be alert and comfortable. This requires balanced, nutritious, and appealing menus. An association holding a gala awards dinner is likely to have somewhat different objectives. For the gala, the food must be impressive and spectacular, with a celebratory atmosphere.

The catering manager of the facility facilitates the planning of what foods and beverages to serve, how they will be served, what seating arrangements will work best, and what décor should be used. To ensure success, provide the catering manager with a clear vision of the objectives for the event, as well as history of group’s food and beverage preferences from historical information documented at previous events and meetings. Very often, the food and refreshments make an event memorable.

The following needs to be taken into account when planning the menus for your event:

- Stature of the audience.
- Professions of the audience.
- Number of special meals – Halaal, Kosher etc.
- The ratio of men to women.
- The age of the audience.
- The time of day & duration of event.
- The theme of the event.
- The impact the food needs to make.
- Choose the type of meal to be served at the function:
  - Breakfast
  - Brunch
  - Refreshments (morning and afternoon)
  - Lunch
  - Dinner
  - Receptions
  - Banquet
Catering is one of the most important ingredients for the planning of some common events. Preparing the delicious delicacies that make an event special is the domain of the event caterer. Armed with specialty dishes, culinary delights and dietary alternatives, the many food options the caterer offers can entice, inspire and satisfy event guests, making it a central focus of event activities. Caterers typically offer a signature selection of hors d'oeuvres, salads and entrees, desserts and beverages.

Caterers can be individuals, small businesses, or chefs associated with a hotel or restaurant. Many hotel venues offer in-house catering services, or may suggest a proven and responsible catering service with which they have enjoyed a professional relationship. Caterers typically provide the serving dishes for a buffet, such as chafing dishes, warming trays, serving utensils and beverages, such as tea and coffee. Artistic chefs may also offer hand-carved ice sculptures as the focal point of a special table, and some supply tableware with accompanying flatware to provide the greatest culinary impact.

A banquet serves the purpose of gathering event guests together for the purpose of presenting awards, recognizing achievement, celebrating accomplishments, or introducing new ideas. Banquets may be defined as those relaxed opportunities to introduce guests to like-minded professionals, long-lost friends, or new acquaintances. The banquet can be a simple affair served by a buffet of culinary dishes, or can be rendered in the more formal format of table service, replete with formally attired waiters and waitresses.

The caterer offers dishes in accordance with the desires of the event sponsors, providing any number of menu options generally priced on a per-person basis. Caterers are also flexible, capable of producing variations of dishes or offering specialty menus to accommodate the needs of guests limited in their food choices due to diabetes, weight loss programs, or allergies.

The caterer must have an idea of the number of guests expected to attend the banquet, and details must be defined as to the types of beverages to be served, the selections of hors d'oeuvres prior to the main meal, and the desserts that follow. In addition, the caterer may provide servers for the event, and needful equipment such as chafing dishes, plates, glasses, and tableware. Necessarily, these details must be carefully considered, that the event take place without experiencing the horror of a banquet marred by the lack of personnel, necessary tools to conduct food service, or worse, running out of food.

Determining the number of guests anticipated to attend a banquet is most easily ascertaining by on-line registry, return RSVP to delivered invitations, ticket sales, or sign-up sheets. Allotments should also be made for the occasional important guest whom fails to reserve a seat, as well as for unexpected guests, or last-minute invitations. For this reason, caterers often promise delivery of a reasonable excess to accommodate extra guests who might otherwise be turned away from joining in the festivities.
Food

Food is a component of successful business events. The event theme plays an important role in helping to determine the menu to be presented at the event. While chicken cordon bleu may satisfy guests attending a semi-formal affair, the same dish presented amid tuxedo-clad men and women dripping with diamonds, simply does not work. Likewise, an event centered on a tropical theme seems amiss with chicken cordon bleu gracing guests’ plates, where there should be lobster, prawns, fish, steamed mussels and fresh tropical fruits.

The cost of such meals plays an important role in the selection of food for the event. It is proven easier to offer a more selective, pricier meal when tickets are purchased by event guests prior to the event, that caterers may prepare the food in accordance with guests’ selections. Events whose meals are an included part of the event are often less costly when choosing from the caterer’s established menu offerings, than when the caterer must meet unfamiliar menu selections demanded by the event planning committee.

Food has a natural place amid the bustle and excitement of events honouring achievements, celebrations, or kick starting a new business. Food also brings together event goers in a more relaxed atmosphere conducive to conversation, establishing broader social networks, or reuniting old friends. The offer of a meal is a necessity for events that centre on industry training, where long hours of classroom lectures and immobility tend to make guests sleepy. Food refreshes the mind, cheers the soul, and makes a long afternoon easier to tackle, with a forward anticipation of evening socializing and camaraderie with newly developed friends.

At less-formal affairs, such as company picnics held in the open air, a barbeque is a natural choice. Likewise, the event, which has as its goal to present a number of industry-related products and services, is very well served by the offering of a diversity of vended foods. The use of food vendors allows event guests to pay for their own meals in accordance with their appetites and their budgets. Vendors also offer the benefit of additional income for offsetting the costs of the event itself, typically requiring a deposit to reserve a space at the event well in advance, and contractually providing a portion of their profits to be paid to event sponsors.

In addition to the date, time and location, consider the following items:

- Why is the event being held? Is it for business, networking or social purposes?
- Will the event have a theme?
- What are the demographics of the attendees? Will there be any VIPs?
- Will the event be formal or casual?
- What type of service is preferred (buffet, table service)?
- Will entertainment or presentations take place during the event?
- Will other scheduled activities precede or follow the event (a meeting, a reception, a dance)?
- What is the event budget?
Eating and drinking are necessary and should be pleasurable for people, whether they are grabbing a snack, or dining in style. The organiser must determine the functional needs of food service:

- **Who must be fed**: Attendee/stakeholder groups, how many, demographics.
- **Why they must be fed**: Sustenance, energy, attentiveness, hydration, refreshment.
- **What they must be fed**: Meal type, special diets, variety, nutrition and budget.
- **When they must be fed**: Time, position within program, speed of food service, trickle/dump arrival.
- **Where they must be fed**: on/off premises, meeting room, tent, backstage, sit – down, standing, strolling.

### BEVERAGE MANAGEMENT

Careful selection of both alcoholic and non-alcoholic beverages can add to the success of a reception or meal.

### ALCOHOLIC BEVERAGES

The choice of whether to serve alcohol with a meal will depend upon the event budget and the impression the host wishes to convey, In general, beverages should not exceed 20 percent of the budget for a catered meal.

Wine is the most popular alcoholic beverage to be served with dinner. Many caterers use a standard formula of about one half bottle of wine per person for a seated affair. Consumption will average about three glasses of wine per person during a 2 – hour reception. Whenever possible, try to obtain the history of the group for an accurate estimate.

When making spirits or hard liquor available, be sure to request that bartenders use jiggers with pour spouts to control portions. For liability reasons, do not allow doubles to be served. The great variety of beers now available includes light beers, non-alcoholic beers, and specialty beers. Beer has become increasingly more popular and guests appreciate having choices.

Other considerations:

- **Have neutral beverages**: It is important to provide neutral non-alcoholic) choices for those who do not drink alcohol. This types of beverages include effervescent or still waters, sodas (including diet and caffeine – free), coffee and decaffeinated, herbal and decaffeinated teas, non-alcoholic beers and wines, ices tea, fruit punches, and fruit juices.

- **Themed beverages**: The catering manager may be able to suggest beverages that go well with the theme of the event.

- **Matching food and wine**: Generally speaking, delicate, less – flavoured foods should be served with white wines. Red meats, pastas with meat and tomato sauce, and other strong – flavoured foods should be served with red wines.
There are a number of strategies that you can use to reduce the risks associated with serving alcohol.

- Use only licensed liquor providers and trained bartenders.
- Always provide high – fat foods with alcohol service, avoiding salty snacks.
- High protein, high – fat foods are best.
- Do not place bars near the door, but do place food stations near the doors so that guest will begin eating before drinking.
- Use a portion – control system rather than free pouring.
- Do not allow doubles or shots.
- Close bars 30 minutes to one hour before the scheduled end of an event, offering coffee or other non-alcoholic beverage service for the remainder of the event.
- Do not announce a “last call”.
- Feature attractive alcohol – free beverages.
- Implement a designated driver program.
- Monitor entrance to event.
- Arrange for security personnel.

### BEVERAGE PURCHASING OPTIONS

- **Cash or No – Host Bar:** A cash bar is an option when drinks are not paid for by a host. Guests pay the bartender directly or present a ticket for each drink. Tickets may be the same price for all drinks, or there may be different coloured tickets and different prices for wine, beer, spirits, and soft drinks. Most facilities place a minimum on the number of drinks sold per bartender. If the minimum mount is not reach, the organisation must pay for each bartender’s time for a minimum number of hours. These minimums are generally negotiable.

- **The per – drink price:** May or may not include a gratuity and may be only for house brands rather than premium or name brands. Be sure to ask what will be served and what the price includes. Snacks or hors d’oeuvres may be added and charged to the organisation on a per - person or quantity basis. Beverage consumption with a cash bar is usually much lower than when a host is paying the bill. When the party is scheduled as the usual cocktail hour following an event or meeting, approximately half of the participants will stay for the event. Consumption typically averages 1.5 drinks per person for a 1 – hour cash bar function.

- **Open or Hosted Bar:** When a sponsor or hosting the reception as an open bar, expect much higher consumption and costs than for a cash bar. When cocktails and hors d’oeuvres are hosted at the usual cocktail hour, 80 percent of the group may be expected to attend. Average consumption is 2 to 2.5 drinks per person for a 1 – hour open bar, 3 to 3.5 for 1.5 hours.
METHODS FOR PAYING FOR AN OPEN BAR

→ **By the person** – The organisation pays a flat amount for the duration of the party, or per person, per hour, whether the guests choose a cocktail, a soft drink or no drink. The per-person price may cover only beverages or may include snacks and hors d’oeuvres. The number of attendees for which the sponsor is charged may be based on a guaranteed number and/or the number of tickets collected at the door.

→ **By the drink** – A per-drink charge is tallied and a single check presented to the function host. Prices are negotiated in advance.

→ **By the bottle** – The hosting organisation pays only for those bottles opened (whether or not any beverage has been poured from the bottle). The event organiser controls the inventory of the number of bottles present before the party and the number remaining at the close of the function. Partial bottles (sometimes referred to as subs) become the property of the organisation at the end of the event.

→ **Limited consumption bar** – The host organisation established the maximum amount they are willing to spend. This works best on a per-drink basis when a cash register is used or there is a time limit for the open bar. When the cash register reaches the set amount or the bar has been opened for the pre-designed time period, the bar closes or is converted to a cash basis.

### MENU PLANNING

The choice of the main course is important and serves as the starting point for selecting the rest of the meal. If the choices on the standard menu do not seem appropriate for the meal function, ask for a customised menu. If there is uncertainty as to whether particular dishes will appeal to the attendees, asking to taste menu items in advance is appropriate.

When selecting food and beverage offerings consideration of the geographic location should also be made. Guests will come from all demographic groups, so menu planning must take this into consideration when choosing food items. Average age, gender, ethnic backgrounds, socioeconomic levels, diet restrictions, and where the guests come from, can indicate the types of menu items that might be most acceptable to the group. Psychographics, guests’ life styles and the way in which they perceive themselves, are also useful indicators.

There are many things that need to be considered when catering for an event. Guests will come from many demographic groups, so menu planning must take into consideration age, sex, ethnic backgrounds, socioeconomic levels, diet restrictions, where the guests come from and employment.

It is important to consider the following when planning menus:

1. Seasonal food.
2. Ethnic foods.
3. High quality, fresh and safe ingredients.
4. New and unusual ingredients.
OTHER CONSIDERATIONS

It is risky to offer items such as fish or lamb to a large group as these items are not universally appreciated. If the meeting manager would like to be a bit adventurous, a split entrée may be appropriate. An example would be surf and turf, perhaps a small filet mignon with three grilled jumbo shrimp.

When people are hungry, they are more likely to become irritable. Well balanced meals with adequate portion sizes leave attendees calm, satisfied and ready to learn. Refreshment breaks also help to stave off hunger, elevate the mood, and thereby enhance learning or concentration.

Caterers notice that many guests are reluctant to give up their dessert course. The typical guest feels cheated if the meal ends without dessert. The dessert creates the last impression of the meal and should attempt to be spectacular or unusual.

There are some important questions that need to be considered whilst engaging in the event:

- Do attendees have to leave their seat or position in order to obtain food and drink, or can it be made available via roving vendors?
- Is there an interval or lull during which spectators can leave their positions? If the interval is short, provision must be geared up to deliver quickly, thereby maximizing sales opportunities.
- To what extent are spectators able to bring their own food and drink?
- If using a buffet set up – how many access points are there?

SERVICE RATIOS

STANDARD SERVICE RATIOS

It is important to ask how many tables will be assigned to each server and clarify the timing of all aspects of the event. Discuss with the catering manager the level of service that can be expected. Dinner service levels can range from one server per eight guests to one server per 40 guests. Most hotels plan one server per 32 guests. It is appropriate to request one server per 20 guests at a standard dinner and one per 16 if wine is served or an upscale service is planned.

For optimum service levels:

- Rounds of 10 1 server for every 2 tables
- Rounds of 8 1 server for every 5 tables
- Bussers 1 for every 3 servers

With poured wine:

- Rounds of 10 2 servers for every 3 tables
- Rounds of 8 1 server for every 2 tables
- Buffets 1 runner per 100 – 125 guests
Cocktail servers:
Can only serve from 48 – 64 beverages per hour. They can carry from 12 – 16 beverages per trip.
May take 15 minutes per trip to the bar.

Buffet:
- 1 server per 80 guests.
- 1 buffet table per 100 people.
- Add 2nd buffet table when you exceed 120.
- Buffet tables more than 16 feet long need to be 2 tables wide.

Sit-down or buffet:
- 1 captain per 100 guests.

Sit-down:
- 1 server per 2 –3 tables (about 20 guests).
- 1 bus boy per 3-4 tables.
- Typical seated lunch takes 1 1/2 hours to serve 100 people.
- Typical seated dinner takes 2 hours to serve 100 people.

Butler passed hors d’oeuvres:
- 1 server per 50 guests.
- Hors d’oeuvres passed on trays reduces consumption.
- 4-6 hors d’oeuvres per person for light food receptions.
- 8-11 hors d’oeuvres per person for heavy food receptions.
- Less expensive to purchase food by the quantity instead of a fixed price per person menu plan.
- Provide seating for only 20%-25% of attendance at receptions.

Cocktail party:
- 1 or 2 bartenders per 100 guests with staggered arrival.
- 1 bartender per 50 with group arrival.
- 40% coffee drinkers prefer decaf.
- 50%-75% diet sodas vs. 25% regular sodas are consumed.
- 1/2 bottle wine per person.
- 1.5 beverages per person consumed per hour at a cash bar.
- 2.5 beverages per person consumed per hour at a hosted bar.

### Estimating Alcohol Consumption

#### Lunch (Servings per person)

<table>
<thead>
<tr>
<th>People:</th>
<th>4</th>
<th>8</th>
<th>12</th>
<th>30</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktails</td>
<td>6</td>
<td>12</td>
<td>18</td>
<td>45</td>
<td>150</td>
</tr>
<tr>
<td>Glasses of wine</td>
<td>8</td>
<td>12</td>
<td>36</td>
<td>60</td>
<td>200</td>
</tr>
<tr>
<td>Liqueurs</td>
<td>4</td>
<td>8</td>
<td>12</td>
<td>30</td>
<td>100</td>
</tr>
</tbody>
</table>
### Cocktail Party (Servings per person)

<table>
<thead>
<tr>
<th>People:</th>
<th>8</th>
<th>12</th>
<th>20</th>
<th>30</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktails</td>
<td>24</td>
<td>36</td>
<td>60</td>
<td>90</td>
<td>150</td>
</tr>
<tr>
<td>Glasses of wine</td>
<td>24</td>
<td>36</td>
<td>40</td>
<td>90</td>
<td>150</td>
</tr>
<tr>
<td>Per hour after 2hrs.</td>
<td>16</td>
<td>24</td>
<td>40</td>
<td>60</td>
<td>100</td>
</tr>
</tbody>
</table>

### Dinner (Servings per person)

<table>
<thead>
<tr>
<th>People:</th>
<th>4</th>
<th>8</th>
<th>12</th>
<th>30</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktails</td>
<td>8</td>
<td>16</td>
<td>24</td>
<td>60</td>
<td>200</td>
</tr>
<tr>
<td>Glasses of wine</td>
<td>8</td>
<td>16</td>
<td>24</td>
<td>60</td>
<td>200</td>
</tr>
<tr>
<td>Liqueurs</td>
<td>4</td>
<td>8</td>
<td>12</td>
<td>30</td>
<td>100</td>
</tr>
<tr>
<td>Per hour after</td>
<td>4</td>
<td>8</td>
<td>12</td>
<td>30</td>
<td>100</td>
</tr>
</tbody>
</table>

### Evening (Servings per person)

<table>
<thead>
<tr>
<th>People:</th>
<th>4</th>
<th>8</th>
<th>12</th>
<th>30</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktails</td>
<td>16</td>
<td>24</td>
<td>48</td>
<td>120</td>
<td>400</td>
</tr>
<tr>
<td>Glasses of wine</td>
<td>16</td>
<td>24</td>
<td>48</td>
<td>120</td>
<td>400</td>
</tr>
</tbody>
</table>

### BUDGETING FOR FOOD AND BEVERAGE CONSUMPTION

When booking catering and beverage numbers it is important to know what your cancellation rates are for each of your events. If you know that you constantly have about 30% no shows – then don’t book for 100% of food and beverages as you will be losing money. You have to become good at attendance number projection. This will help you save money on your budget.

### CALCULATING ATTENDANCE

Knowing how many people are to be invited and the expected return is important for determining the size of the facility to use and the amount of food to order. To facilitate this, you may want to suggest that guests RSVP (respond) to the invitation and you, or the client can keep track of this information in a database. If this is not possible, you will have to estimate the return based on information you can gather from previous events.

For private hosted events where the host knows the people on the invitation list, a general rule of thumb is to expect 25% less than invited to actually attend. So if you’ve invited 100 people, you can assume a crowd of 75. This seems to run true even if people have responded to say they are coming. If the invited guests are paying for the event themselves, for example a R50 per person fundraiser, the amount of reduction should be counted at 15%.

With events that the host does not know the people on the invitation list, the return is much less.

**For Example:** Say the insurance association secured a list of names and addresses from the local gym and sent out invitations to these families. In this case, the rule of thumb is to expect no more than a 10-25% return. So for 100 invitations, less than 25 people will probably attend. Of course in all these scenarios, there
are other factors, such as past attendance history, if it is a company mandated event and other considerations that must be well thought-out when planning for your numbers.

Another term and number worth mentioning here is ‘set-over’. When working with a caterer, restaurant/banquet or hotel facility, they will generally set-over anywhere from 3-10% of the guarantee. So if you have told them you will guarantee and pay for 100 guests, they will set places and prepare food for 103-110 people. And usually you do not end up paying for this additional service even if it is utilized.

Using the bank’s Christmas party example, let’s assume you’ve received 100 affirmative RSVPs. We already know that on average, 25% are not going to show up for one reason or another – a kid gets sick, something comes up, etc. So we guarantee with the hotel that we’ll pay for 75 plates of food. Their policy is to set for 10% over so you’ll actually have a place for 82 – just in case you do have a better return. Be aware this policy does vary from business to business so be sure to ask about it when you are working on the contract.

**FOOD SERVICE STYLES**

- **Action Station**: Chef prepares food to order and serve to guests at separate station within a buffet setup.
- **Buffet Service**: A self – service food presentation offered on a table in trays, chafing dishes, often with a server or carving station at end of line.
- **Butler Table Service**: Platters of food, served by waiters to each guest. Guests serve themselves with utensils from platters.
- **Butler Hors d’oeuvres**: Trays of hors d’oeuvres. Servers pass among guests, and guests serve themselves.
- **Cafeteria Service**: Similar to buffet service, except guests are served by counter attendants and may utilize trays to carry all selections. Used for employee meals.
- **Family – Style Service**: Platters and bowls of food are arranged in the middle of the dining table, and guests help themselves, passing the containers to one another.
- **Food Stations**: Similar to buffets, but with a different type of food or part of the menu at each station, and with stations located in different places within the event space.
- **French Banquet Service**: Platters of food arranged, guests select foods, and server then portions and serves each food item selected to individual plates with two large utensils manipulated as tongs.
- **Hand Style**: For each meal food is pre-plated, one server is assigned for every two guests; when signal is given, all servers set plates before all guests at precisely the same time. Sometimes plates have dome covers, which are all lifted at the same time.
- **Plated Buffet**: A selection of pre-plated foods or individual meals is set on trays and placed on a buffet table or rolling cart and moved into function room at predetermined time.
- **Plated Service**: Foods are portioned and arranged on individual plates and then served to seated guests.
• **Pre-set Service:** Pre-plated foods are placed on dining tables prior to admitting and seating guests; suitable only for foods that can maintain culinary and sanitary quality when sitting out for extended period of time.

• **Reception service:** Foods in small portions are served buffet style or placed on trays and passed by servers; guests serve themselves and eat while standing.

• **Russian service:** Foods are cooked tableside and put on platters. The server presents platters to the guest’s tableside, and guests serve themselves from the platters. Known as silver service. Used for very formal upscale events.

---

### SPECIAL MEAL REQUIREMENTS

### VEGETARIANS

Vegetarians do not eat meat, fish or poultry whilst vegans abstain from eating or using animal products, including milk, cheese and other dairy items, eggs, wool, silk and leather.

There are many different types of vegetarians namely:

- **Ovo – vegetarian:** Excludes all animal flesh and milk but consumes eggs.
- **Lacto – vegetarian:** Excludes all animal flesh and eggs but consumer milk.
- **Lacto – Ovo vegetarian:** Avoids all animal flesh but consumes eggs and milk.
- **Pesco – vegetarian:** Avoids red meat and fowl but consumes fish and seafood.
- **Semi or partial vegetarian:** Consumes some milk products, eggs, poultry and fish but eats primarily plant – based foods.

### HALAAL

Pertains to food and drink alike.

- **Halaal Strict** – requires a copy of a Halaal certificate and will show which items are deemed to be Halaal from the caterer/restaurant.
- **Haraam means forbidden.**
- **The Arabic word Halaal (Halāl, halal) means permissible.** Many non-Muslims often assume that the word only refers to meat, but it is actually used to describe things that are not allowed in the Muslim religion, those things that are Harram (not allowed) under Islamic law.
- **Unhalaal or Haraam meat is any animal that has not been slaughtered in the name of Allah (God), but rather killed with a stun gun or killed for idols or other Gods, as everything done in Islam, must be done in the name of Allah.**
- **In Islam, animals are not shot but rather slaughtered, with a quick slit of the animals’ neck causing minimal pain.** There are strict rules when slaughtering animals when it comes to Islam. Examples of these rules are that the animal must receive minimal pain when being slaughtered, the blade used must also be as sharp as possible (to reduce the pain of the animal) and the blood must be drained completely before the head is removed.
• This purifies the meat by removing most of the blood that acts as a medium for microorganisms, this also means the meat remains fresh for longer.

• Other Haraam items under Islamic law are:
  - Alcohol or liquor.
  - Animal gelatine.
  - Animal fats or rennet (an enzyme having the property of clotting or curdling milk).
  - Pork and pork products are totally forbidden because it cannot be slaughtered as it has no neck and because pigs are more at risk for various diseases as the pig is found to be a host for many parasites and potential diseases.
  - The utensils should be separate for Muslims. There should be no contamination of Halaal and non-Halaal.
  - Any item marked or stamped with any form of Halaal certification must be verified by appointed the Muslim theologians, who are well versed with the Islamic requirements regarding Halaal.

• Halaal food product guidelines. Food product must be free from all of the following:
  1. Any product or by-product derived from pig or dog.
  2. Blood.
  3. Carnivorous animals (except fish).
  4. Birds with talons or birds that feed by snatching and tearing e.g. eagles and other similar birds.
  5. Reptiles and insects.
  6. Any marine animals except fish.
  7. Animals that live on land and in water (amphibians) like frogs, crocodiles and other similar animals.
  8. Animals which have died, by any means other than slaughtering according to the Islamic Law.
  9. Animals which are generally considered as repulsive such as lice, maggots, mice, rats, spiders and other similar animals.
  10. The bodies of animals permitted under the Islamic Law (that is cow, sheep, lamb, goat, deer, poultry and such like) which are not slaughtered according to the Islamic Law.
  11. Wine, Ethyl Alcohol or Spirits, where these remain in their original chemical form
  12. Any product or by-product (including any product used temporarily as a substitute) which contains or is derived from any one or more of the above products (as defined in sections 1. to 11.) in however minute quantity, whether as an ingredient or sub-ingredient or as a processing aid or as a releasing agent or as a glazing agent or as an additive or as a colour or in any other form, is Haraam (unlawful) for Muslims.
KOSHER

Kosher is eaten mainly by Orthodox Jews. Forbidden to eat parts of animals such as eggs and milk. Animals that chew their cud and have cloven hooves are “clean” or “kosher”; such animals include cows, sheep, goats and deer. Animals such as pigs are seen as unclean. Birds that scavenge are also forbidden but the following are permitted – chicken, geese, ducks and turkeys. Bees honey is permitted – however eating bees is forbidden.

- The Hebrew word kosher means “fit.” The kosher laws define the foods that are fit for consumption for a Jew. Kosher food is food that meets Jewish dietary laws, or kashrut, which comes from the Hebrew word for "fit" or "proper." Any food can be called kosher food if it adheres to Jewish law, or halacha. Conversely, foods typically labeled as "Jewish” aren’t necessarily kosher.
- The word "kosher” is not only used for food, however. Kosher basically means that something follows all the Jewish legal guidelines.
- Kosher food laws are rather extensive. Some are derived directly from the bible and others through rabbinic interpretations over the years. What are some of the laws governing kosher food?
- According to the Torah (also known as the five books of Moses, the Old Testament, or the Pentateuch) cloven hoofed, cud-chewing mammals are kosher. Deer, sheep and goats, for example are all kosher, while pig and rabbit, for example, are not.
  - Only certain birds are considered kosher in the United States. This includes chicken, duck, goose, and turkey.
  - Lobster lovers might be dismayed to find that for seafood or fish to be kosher, it must have fins and easily removable scales. Shellfish generally, and lobsters, shrimp, and clams, specifically are not kosher. Fish, on the other hand, such as tuna, carp, and herring, are kosher, but only if they are prepared by a kosher fishmonger with kosher cutting implements and machines. There's more. In most cases, scales must be present on the fish in order to be purchased by the consumer.
  - Fish and meat cannot be served together.
  - Milk and meat cannot be served together. Rabbinic law includes poultry in this prohibition, however fish is excluded.
  - Processed food must be prepared in the presence of a rabbi.
  - Poultry and meat must be slaughtered under strict guidelines called "shechita." This means the animals are slaughtered without pain.
  - Kosher kitchens must maintain separate sets of utensils, pots, pans, dishes, and anything else that comes in contact with food. In addition, dishes and utensils in a kosher kitchen can't be washed together. If a kitchen has two sinks, it is an ideal setup for a kosher family. If not, separate wash buckets are often used. Dishes and utensils must be dried using separate racks or dishtowels as well.
FOOD AND BEVERAGE ETIQUETTE

Proper serving etiquette is a list of rules about how food should be presented and served at formal parties and restaurants. The precise details of serving etiquette vary, depending on cultural norms, and the rules may be bent on occasion for special circumstances. Training in proper etiquette for serving is usually offered to people who work in fine restaurants or who provide wait services for catering companies.

While serving etiquette may seem petty and a bit restrictive at times, it actually has some very sound reasons for existing. Coordinating service was critical in an era when people were waited on by servants, because it ensured that the servants worked smoothly together without crashing into each other or dropping things. Observing proper etiquette is also designed to keep guests comfortable, and to make people feel welcome.

• When people are served, the tradition is to start with the guest of honor, followed by the women in the party, the men, the hostess, and finally the host. If the delineations between guests are not clear, servers start with the oldest woman at the table, and work their way down to the youngest man. The same order is followed when taking orders in a restaurant.

• Food and beverages are usually served from the left and cleared from the right. In some regions of the world, this is reversed, with staff serving from the right and clearing from the left. Exceptions may be made, as for instance when a guest is leaning to speak to another guest, making it difficult to serve or clear in the conventional style, or when guests are seated against a wall which makes it logistically difficult to serve and clear from different sides.

• Plates are served all at once, and cleared all at once, so that courses come out together. In some restaurants, wait staff may clear plates as people finish, although this convention is frowned upon in the rules of etiquette. The idea is that someone who lingers over his or her meal may feel pressured if the plates of other guests are cleared, since this may suggest that the guest should hurry up. On the other hand, guests may not want to look at dirty plates while they wait for others to finish, in the belief of some restaurant owners and waiters.

• There are additional nuances of serving etiquette, some of which can get quite complex. For example, in some establishments, liquids are served from one side, and solids from another, and pre plated food may be served from a different side than foods which are portioned out at the table. There may also be cultural norms to observe, such as not handling food with the left hand in the Middle East.

THE NAMES OF COURSES

• Hors d’oeuvre or starter: first course served
• Entrée: course between starter and main course (soup, fish, salad or antipasti)
• Sorbet
• Main course
• Dessert
• Cheese and biscuits
• Whether silver, stainless steel or coloured, precise rules govern the placing of the cutlery.
• Starting with those furthest out, one works inwards.
• The knife and soup spoon are set on the right of the plate with the cutting edge of the knife turned inwards.
• The fork is on the left with the serviette beside it.
• Above the plate, perpendicular to the rest, are the dessert knife and fork: first the knife with the handle turned to the right and the blade towards the plate; immediately above is the fork, with the handle turned towards the left.
• If a spoon is also required it can either be brought to the table with the dessert, or may be placed above the fork, with the handle to the right.
• Glasses are placed to the right of the plate, in decreasing order of size: water, wine and lastly dessert wine. The dessert and the glass for the accompanying wine may also be brought to the table together.
• If you like to provide a bread plate, this should be placed to the left of the fork.
• If you are serving antipasti, provide a side plate on top of the dinner plate. If beginning with pasta, put a pasta dish on top of the dinner plate.
• At the end of a course, plates are removed from the left and clean plates are offered from the right.
Place Plate
- The place plate is placed one inch from the edge of the table.
- If the first course is already on the place plate, the napkin is placed to the left of the forks; otherwise the napkin will be on the plate.

Forks/Flatware
- Handles of the flatware are aligned at the bottom.
- The forks (no more than three) are at the left of the place plate, placed in order of use, working from the outside in.
- The oyster fork is the only fork on the right side with the knives.

Knives
- Knives, no more than three, are at the right of the place plate in order of use, from the outside in, with the cutting edge toward the plate.
- The only spoon (for a first course) is placed to the right of the knives.

Dessert silverware
- The dessert fork and spoon are above the place plate, the bowl of the spoon facing left, the fork below facing right.
- In the most formal setting, the dessert fork and spoon are brought in on the dessert plate.

Glassware
- No more than four glasses are set on the table, in order of use, for water, white wine, red wine and champagne, from the left to the right.

CATERING MANAGEMENT CHECKLIST

CONSIDER THE FOLLOWING:
Catering Management.
Operations.
Lines and Furniture.
Table ware.
Serving ware.
Bars.
Food.
Beverages.
Program: Timing of Service.
Theme and Concept.
Site.

FOOD TASTING
Food Tastings Scheduled.
Take Photos of Food and Tasting.
Final No.
Person Responsible for Sign Off.
Special Requirements.
Halaal/Kosher Certificates.
Ingredients Certificate.

CATERING MANAGEMENT
No.
Costing.
Number of Courses.
Restrictions.
Audience.
Printed Menus.
No. of Menus per Table.
Confirm Theme Linked.
Waiters Serving Etiquette.
Waiters in Room during Speeches.
Waiters Clearing Etiquette.
Dress code.
Service Ratio.

LOGISTICS
Infrastructure Requirements.
Technical Requirements.
Risk.
Generators/Gas.
Cash Bar Credit Card Facilities.
Money Management.

LINENS AND FURNITURE
Chairs.
Tables.
Napkins.

TABLE WARE
Crockery.
Linens.
Pitchers.
Other Glassware.
Flatware.

SERVING WARE
Coffee cups and saucers.
Racks.
Trays and Jacks.
Coolers for Ice/ Scoops.
Pots and Pan.
Salad Racks.
Pastry Racks.
Cleaning Supplies.
Dishes.

**BARS**
Stirs.
Ice buckets.
Bar Equipment.
Bar Furniture.

**FOOD**
Food Required.
Type Food.
Service Style.
Menu.

**BEVERAGES**
Beverages Required.
Type Beverages.
Service Style.
Brands.
Welcome Drink.
Welcome Food.
Table Wines.
Replenished.
Personnel.
Holding Room Beverages.
Coffee/Tea Stations.
Juices.
Soft Beverages.
Water.
Wine List.

**SUMMARY**

Almost all events include some sort of food and beverage function. The food and beverages, and the manner in which they are served, can help make the event more memorable and more productive.
COMMUNICATION MANAGEMENT

*Communications management* is the systematic planning, implementing, monitoring, and revision of all the channels of communication within an organisation, and between organisations; it also includes the organisation and dissemination of new communication directives connected with an organisation, network, or communications technology. Aspects of communications management include developing corporate communication strategies, designing internal and external communications directives, and managing the flow of information, including online communication. New technology forces constant innovation on the part of communications managers.

COMMUNICATION CHECKLIST

GENERAL REQUIREMENTS
Communication requirements.
Communication technologies.
Communication plan.
Information distribution practices.
Project presentations.
Project reports.
Performance reporting.
Administration.
Announcements.
Briefings at event.
Command and control.
Contact list.

EFFECTIVE EVENT COMMUNICATION

It is one thing to plan the event but it is another to communicate this plan to the various stakeholders. Correct event documentation is vital to effective management.

The advantages are:

- It communicates the plan of the event to the staff and volunteers.
- The documents provide an on-going record of the event's progress.
- They provide a history of the event planning which may be used in any liability issues.
- They provide a written basis on which to improve the methods of event management.
- By standardising the documents, different events can be compared.
- The production of the documents creates a discipline in the planning.
- The documents impersonalise the plan. It takes it out of the hands of any one person and it becomes separate from any individual.
- The documents proved a link to other departments within a corporation such as finance and with the sponsors.

One of the most common fears in event management is what happens if the event organiser falls ill (‘run over by a bus’ is the colloquial saying).
As long as the details of any event are in the head of one person, there is this risk. The results of the project management process used in event management, are documented as various schedules, responsibility and action sheets. Each event organiser has evolved their own style of sheets. They are called by various names, e.g. production schedules, task lists, output matrix, timelines, run sheets, critical paths, checklists, event order, milestone lists, show schedule, show sequence. The terms used generally reflect the past work experience of the event organiser.

However, they all converge into six planning and control documents:

- Contact sheet.
- Responsibility chart.
- Task or action sheet.
- Work package.
- Checklist.
- Run sheet or production schedule. This is the implementation schedule which concerns the program of task at the actual event and can be further subdivided into specific Run Sheets - such as Rehearsal, Technical, Shut down, etc.

**COMMUNICATION PROCEDURES**

In order to adhere to clear communication procedures, be aware of:

- Communicating with internal (in-house) and external service providers regarding contributions towards the event.
- Issues such as accommodation, transport, facilities, menus and refreshments that are communicated and arranged with appropriate in-house sections.
- Issues such as themes, decoration, etc. that are communicated and arranged with external service providers.
- Dealing with the client in a professional manner.

The event organiser needs to able to communicate ideas effectively to carry the plans the team has decided on in time and in an orderly manner. This is true not just for the day of the event but also if an emergency occurs such as the date of the occasion being pulled back, the leaders still have to run a smooth process by telling the appropriate departments what needs to be done.

If the people running the show (the main event organisers) are not good at effective communication then there are high chances that the entire process of putting the show together would fall apart. Hence, any person in a career in event planning not only needs to consider organisation, creativity, and effective time management but also needs to learn how to deliver his or her own ideas in ways that other people can easily comprehend and carry out.
COMMUNICATING WITH THE CLIENT

Communicate continuously with the client. The client should be kept informed at all times of the progress, constraints and be given the various options to select. It is important to maintain professional, open communication with clients. Good communication leads to a better working relationship with people- this means more money and more jobs for you.

Remember the following points:

- **Respond quickly.** It shows that the organiser cares about their questions and that their business is important.
- **Always identify the next step.** Be very clear on what the next step of the process is.
- **Be honest.** Honesty is crucial in creating a working relationship with clients. Be honest about the time frame, or about delays. The most important thing is to keep them updated as to what has changed. Many obstacles can be overcome by honestly explaining the problem, and keeping communication open. People respond to honesty and do not feel like they are being led on.

COMMUNICATION WITH SERVICE PROVIDERS

It is a good idea to have ready access to all important information and documentation on the day of the event including:

- Copies of all contracts and permits.
- Incident/accident report forms.
- Safe work method statements from contractors.
- A running sheet outlining the timing of your event.
- Contact phone numbers of all staff, volunteers, performers, emergency personnel and other key stakeholders.
- A risk assessment matrix and management plan.
- A site plan, preferably with grid references.
- An emergency response plan, including emergency medical plan and emergency communications plan.
- A transport management plan.
- A crowd management plan.
- An alcohol and glass management plan, if relevant.
- A security plan.
- A public communications plan.
- Radio protocols and channels if relevant.
- The chain of command.

One way to help staff and volunteers be fully briefed on key aspects of the event is to collate all important relevant information into one document (the event manual) and provide it to them at a meeting (briefing) several days before the event. This is particularly useful for large events.
At that briefing, the event organiser should go through the manual with your staff and volunteers, and allow time for questions. Encourage staff and volunteers to make themselves familiar with the manual’s contents, so that they can be as clear as possible about what will happen on the day.

COMMUNICATION WITH INTERNAL (IN-HOUSE) SERVICE PROVIDERS

Ensure the individual tasks are clearly communicated and that each member of the team understands his or her role and responsibility and keeps to the time schedule, deadlines and budgets.

COMMUNICATION WITH EXTERNAL SERVICE PROVIDERS

Communicate effectively with all external service providers. Make sure that everyone is aware of the main event objective and that they understand exactly what their roles and responsibilities are. Carefully communicate with each supplier so that they know what you expect of them.

An example of communicating with an external service provider would be communicating with a florist, which would include:
- Who will deliver the flowers? Is delivery included in the quoted fee?
- Does the florist know the venue?
- What time will the flowers be delivered to ensure they still look fresh?

COMMUNICATION PLAN

PRE-EVENT COMMUNICATION

It is important to consider how you will communicate with people in the lead-up to your event. This can be achieved by conducting a stakeholder analysis which identifies:

- **Who** you should speak to.
- **What** you should speak to them about.
- **When** you should speak to them.
- **How** you will speak to them.

Who you need to speak to will depend on the nature of your event but could include:

- People who will be affected by the event. This will include the non-event attendant as well as those attending the event e.g. Local residents, businesses, motorists, churches, hotels, motels etc.
- Approval bodies.
- People you would like to attend your event, i.e. Your target market for the event.
- Suppliers.
- Potential sponsors.
- The media.
PUBLIC COMMUNICATIONS PLAN (PRE-EVENT)

Developing a pre-event public communications plan for all stakeholders will promote consistency in the event's key messages. You should tailor the messages you send to ensure the group you are communicating with receives information that is important to them.

Elements could include:

- Transport arrangements—changes to regular services, additional services, special fares.
- Traffic arrangements—special event clearways, road closures.
- Parking facilities.
- Special arrangements, e.g. For people with a disability.
- What to bring, and what not to bring to the event, e.g. Alcohol or glass.
- Specific health messages, such as “drinking kills driving skills” and “slip, slop, slap!”
- Services and facilities available at the event.
- Sustainable practices and the event, and how patrons can enhance these practices.
- Specific conditions of entry to the event.
- Where to purchase tickets and ticketing conditions.
- The event times and the entertainment program.

All communication materials should include websites and telephone numbers where people can get additional information.

Some ways of communicating might include:

- A website and/or information phone line.
- A database.
- Publicity or advertising in local and other relevant media outlets, including the “what’s on” section of local newspapers and/or websites.
- Letterbox drops to promote the event but also to inform people and businesses of the event in case they are affected by it.
- Posters/flyers/brochures.
- Letters to, and meetings with, key community groups. Community consultation is important in order to avoid any issues arising from local businesses and residents that might be affected by your event banners and signage (check with your local council as to whether there are any restrictions regarding outdoor posters in public spaces).
- An event launch, media event or pre-event party—this may also help raise funds to support the event).

A website is an excellent way for people to find out more about the event. It can also act as a simple call to action message on advertising material. A website is also the primary tool that can be used to create a database of people interested in attending your event e.g. through an invitation to ‘register your interest here’.
COMMUNICATION DURING THE EVENT

It is very important to consider how to communicate with people at the event. This is particularly so if the event is over a large area or moves from one point to another (such as a parade).

The public communications plan should also reflect ways of communicating with people at your event, and could include:
- A public address system (PA).
- Portable message boards.
- Electronic variable message signs.
- Screens near the stage area or around the event.
- Other forms of signage.
- Information booths.
- Volunteers and way finders.
- Printed guides or programs.
- Online guides and programs that can be downloaded onto mobile phones or handheld devices (this can also reduce paper waste and excess printing costs).
- Using SMS to send event updates and news to mobile phones, provided that event patrons can select whether or not they want to be registered to receive this service.

Developing communication protocols in advance can be vital to ensuring important information is communicated quickly and clearly. Protocols should reflect the command and control structure of the event, and be in line with the emergency communications plan.

Reporting procedures for the following communications should be considered:
- Between staff/volunteers/contractors/suppliers, etc. It may be preferable to use two-way radios as mobile phone signals can sometimes become blocked in crowded areas.
- Between event staff and emergency services and police (ensure you have a list of who to contact in case of an emergency and establish how you will contact them, e.g. By two-way radio).
- Between event staff and those who have access rights to the event, such as local council and inspection officers.
- Between event staff and those people attending the event. Work out how you will provide essential information such as the location of facilities and where to take and collect lost children.
- Within the event coordination centre and within the emergency response room (if different).
- Between the event coordination centre and emergency response room.

If using two-way radios at the event it is a good idea to assign someone to keep a radio log of all key communication. A radio log records the messages relayed at the event. This information is vital if an emergency or crisis situation arises and it aids future planning for similar events.

It is also recommended that the event organiser brief all staff and volunteers on how to use the radios, change the battery and use correct radio protocols etc.
EVALUATING COMMUNICATION

It is important to set measurable objectives for all communications activity in order to identify the success or failure of your efforts.

In order to measure the success of your event you could use the following:
- Attendance figures.
- Number of telephone calls received regarding the event.
- Positive/neutral media coverage.
- Number of articles across all target media.
- Number of competition entries.
- Website visits.
- Feedback from stakeholders.

Capturing and recording event data is also important when reporting successes back to current and potential stakeholders, such as sponsors. Think about what information is needed at the end of the event to aid planning for next time. If possible, try to set up a database through a website that asks visitors for things such as their name, email address, age and postcode. Note that there are strict privacy laws governing collection of private information, so make sure you understand what you need to tell people before starting such a database, and how the information gathered can be used.

CONTENT MANAGEMENT CHECKLIST

Content management is the management of the presentation of information.

GENERAL REQUIREMENTS
Presentation design.
Collation.
Graphics.
Award graphics.
Event graphics.
Onsite management.
Copywriting.
Develop the look and feel.
Brainstorming.

The following areas are addressed: Objective, Audience, Structure, Timings, Tone and Flow
Hours of service.
Meeting location.
Develop, implement and manage content.
Mastering.

PRESENTATIONS
No. Of presentations.
PowerPoint/media required.
Resolution size 3:4 or 16:9 or other.
Presentation resolution.
Videos resolution.
Name of speakers requiring presentations.
Time slot/time allocation for presentations.
Rehearsal required.
Resolution/size of screen for presentations/holding slides/video etc.

**MUSIC**
Requirements.
Type of music.
Music format.
Licenses.
Music stock.
Duration.
Location.
Areas.
Sound volume.

**ANIMATIONS**
Requirements.
Duration.
Format.

**SHOW REELS**
**THEME VIDEOS**
**VOICEOVERS**

**VIDEOGRAPHY/PHOTOGRAPHY**
Post production.
Video editing.
Rendering.
Output.
Disc.
Design.
Master DVD.
Travel.
Who will this be supplied by/supplier.
DVD/CD.
Editing.
Time frame final product.
Technical requirements.
Printing of photos.
Framing requirements.
DVD/CD included.
Editing included.
Time frame final product.
Technical requirements.
PRE PRODUCTION
Script writer.
Voice over artist.
Voice over studio.
Voice editing.
Music editing and mix.

VIDEO PRODUCTION
No. Of cameraman and gear.
Vision mixer.
Hr recording equipment.
Vision mixer controller.
Cables.
Vision mixer controller.
Cables.
Cameraman and gear - non filming travelling.
Tapes and consumables.
Audio and mics.

POST PRODUCTION
Video editing highlights clips with effects.
Capture all presentations.
Export all presentations to disc.
Renderings and output.
Disc design.
Cover design.
Laminated DVD covers.
Sundry costs.
Courier.
Travel.
DVD duplication with screen print.
Round clamshell.
Clear PVC sleeve.
DVD inserts.
Media wall for award winners.
Editing.
Disc output.
DÉCOR AND DESIGN MANAGEMENT CHECKLIST

The management of content, concept and theme, catering, entertainment, environment, invitation, production, program and promotions design.

GENERAL REQUIREMENTS
Décor company to send design storyboard.
Décor confirmed and signed off.
Storyboard with images to be approved.
Mock ups.
Sketches.
Colour scheme.
Layout.
Décor elements chosen.
Décor/design for:
  - Registration areas
  - Restrooms
  - Primary space
  - Secondary space
  - Tertiary space
  - Stage
  - Entrances
  - Parking areas
  - Welcome areas
  - Lifts
Décor compliance.
Flame retardant for fabrics/ props/ materials.
Work at heights compliance.

DESIGN ASPECTS
Catering at event.
Content at event.
Environment/site.
Production and technical.
Promotions for event.

OPERATIONS
Infrastructure.
Logistics.
Production.
Site.
Speakers.
Technical and production.
Lighting pin spots.
Special effects.
Lighting for décor elements.
Production.
Staging.
Entertainment.
Housing.
Catering.
Signage.

**DÉCOR ELEMENTS**
Centrepieces.
Backdrops.
Focal features.
Flowers/Plants.
Confetti.
Smoke machines.
Table numbers.
Candles.
Napkins.
Ice sculptures.
Place cards/ menus.
Scrim.
Pipe and drape.
Flooring/ carpeting.
Staffing/ costumes.
Food and beverages.
Signage.
Linens.
Furniture.
Tableware.
Glassware.
Props.
Bars.
Chairs and tables.
Menus.
Serving ware.

**DÉCOR RESTRICTIONS**
Confetti.
Candles.
Vehicles for demos.
Helium balloons.
Live animals.
Water effects.

**ENTERTAINMENT MANAGEMENT**

*Entertainment management* refers to the management of any and all artists, entertainers for the event and their logistical, housing and operational requirements.
The housing process has changed dramatically in recent year, but one thing remains constant: attendees want and need comfortable and convenient accommodations, arranged with minimal effort and to their exacting requirements. The event organiser’s role is to ensure this happens.

This seemingly simple function has become one of the riskiest aspects of event management. Risk can be managed by understanding the dynamics of the group, arranging for appropriate accommodations with hotel (s), and actively monitoring and adjusting your room blocks throughout the entire housing process. Retaining a group’s history, including the group’s housing requirements, is essential.

Technology has dramatically changed the reservation process. Today, real time online processing allows for instant reservations and credit card processing, immediate acknowledgement back to the attendee, and accurate reports for both the hotel and the event organiser. As the number of reservations made through the Internet has increased, so has the opportunity for attendees to find alternate web sites for housing reservations, attendees may choose to search for the best rates through discount travel agents.

Every event will certainly have an individual or two that requires special accommodation. This can be in the form of specially prepared foods for those with dietary restrictions to making room for wheelchairs and walkers. Accommodating guide dogs, providing seating for special assistants, assuring the service of milk-less, peanut-less, or MSG-less foods to those with allergies that can cause life-threatening health problems all fall within the realm of accommodations.

If the selected venue is located in a multi-story building, access for the wheelchair bound, the infirmed, or the morbidly obese necessitates access to elevators to deliver guests to the event destination. Additionally, seating at banquet tables becomes quite crowded if inadequate space is not given to allow wheelchairs to take a place at the table.

The occasional guest dealing with excessive weight might need the accommodation of a larger, stronger chair. A blind individual might require a space under the table during a meal to allow a guide dog to curl up, away from the intruding feet of other guests. The Vegetarian will appreciate the offering of meatless dishes, and those involved in weight-loss programs or other menu restrictions will be more inclined to attend if food choices present favourable options.

Additionally, restroom doors should be roomy enough to allow access by wheelchair, as well as providing at least one stall large enough to accommodate the wheelchair-bound and those with walkers. Those guests with visual or hearing impairments might be better served by seating placement closer to audio speakers or the event stage to enhance their experience.
Accommodation of guest limitations is best served prior to the event, by means of a query written into invitations regarding special guest needs. Typically, the option of menu choices to meet the needs of the Vegan or those with food allergies will help facilitate preparations, which will ease the uncomfortable circumstances associated with such needs, and prepare the way for all guests to enjoy the event in its entirety.

Lodging of guests is required for events that last for two or more days. When an event requires guests to travel some distance to another location, they may require lodging in hotels close to the event, with easy access to supporting eateries or public transportation. Hotels are typically receptive to booking event groups by offering room discounts, particularly when such an event promises to fill a large number of vacant rooms. Larger hotels commonly offer adequate amenities to service the event itself, and may likewise offer excellent discounts on meeting spaces when attending guests reserve rooms in certain capacities.

Special invited guests or guests of honour are less likely to forego an event if lodging is already paid for them, or they at least have the assurance of a room already reserved in their name. Event sponsors may likewise require lodging during an event for convenient access to pre-event meetings, dinners with celebrities, engaging with speakers or entertaining special guests. Lodging may also be necessary for key event personnel, allowing them to be handily available for meeting the call of event set-up, dealing with momentary confusions and attending last-minute details of event direction.

Reserved lodging typically requires a minimal standard of rooms to realize discounts in room rates. Reserved lodging also requires record of a responsible individual or company credit card information specifically to honour subsequent invoicing of unfilled or unpaid rooms. By requiring response to invitations or the purchase of tickets for guests attending the event, this helps to offset the risks of reserving a large number of rooms, which may or may not be used. For financial protection, however, most hotels offer a 24-hour respite for cancelling reservations, that event sponsors are not held responsible to paying for rooms that not used. This likewise opens rooms for the hotel to offer to non-event travelers at higher standard rates.

**HOUSING RESERVATION PROCESS METHODS**

Five different options are available to facilitate housing for your group. The advantages and disadvantages, and general process for each option is listed below to help you determine the best solution for your organisation.
<table>
<thead>
<tr>
<th>APPLICATION</th>
<th>ADVANTAGES</th>
<th>DISADVANTAGES</th>
<th>PROCESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting attendees contact any hotel directly to make their own reservations.</td>
<td>This method works well for extremely small meetings usually requiring one hotel.</td>
<td>No financial liability for the organisation. Minimal staff time required. No hotel cut – off.</td>
<td>• Provide attendees with a list of hotels in the area along with phone numbers, addresses, and websites.</td>
</tr>
<tr>
<td>The organisation negotiates a contract with the hotel, and attendees respond directly to the hotel via a reservation request (form, telephone, or hotel’s website).</td>
<td>This method works well for small meetings/events usually requiring one hotel.</td>
<td>Discounted room rates for attendees. Discounted rates offered (usually 50% off group rate). Complimentary room nights earned. Guaranteed room availability.</td>
<td>• Negotiate hotel contract(s). • Contact the hotel to determine the best reservation method (form, telephone, or hotel’s website). • Inform attendees on how to make reservations. • Monitor and analyse room block pick up with hotel.</td>
</tr>
<tr>
<td>The organisation manages housing through its own in-house events department.</td>
<td>This method works well for mid to large size events requiring one or more hotels.</td>
<td>• Total control over the housing process. • Meeting/event participants appreciate the personalised service. • Protection for very important person (VIPs) and committee members by ensuring they are housed in specific hotels. • Discounted room rates for attendees. • Discounted rates offered (usually 50% off group rate). • Complimentary</td>
<td>• Select the meeting site. • Negotiate hotel contracts. • Determine the software you will use to process reservations. • Prepare housing form for attendees. • Protect rooms for special groups by creating sub – blocks at each hotel. • Generate housing list for hotel.</td>
</tr>
</tbody>
</table>
### APPLICATION

<table>
<thead>
<tr>
<th>ADVANTAGES</th>
<th>DISADVANTAGES</th>
<th>PROCESS</th>
</tr>
</thead>
</table>
| room nights earned.  
• Guaranteed room availability. | • Possible fees. | • Send out a request (RFP) for a housing vendor.  
• Consider asking the housing vendor to assist with site selections and contract negotiations.  
• Execute a mutually agreeable contract between your organisation and housing vendor.  
• Adhere to the terms of the contract. |

**Hiring a housing vendor to manage your housing process.**

This method works well for mid-size to large city-wide conference where multiple hotels are needed to accommodate the group.

• Employs latest technologies to facilitate housing process.  
• Real – time, online reporting for client and hotel partners.  
• Consistent service from year to year.  
• Knowledge of hotels.  
• Established rapport with local hotel representatives as well as national sales representatives.  
• May be able to handle vast array of services including site inspections, site visits, and contract negotiation.  
• Greater buying power resulting in lower room rates and/or increased concessions for your organisation.

---

**Table 9: Five Housing Reservations Options for Groups**

### HOUSING CHECKLIST

**Group Bookings**

Room Block(s) Required

For a Multi-hotel/Housing Facility Event, Name all Housing Facilities

**Reservations**

Reservation Protocol  
Reservation Method  
Third-Party Housing Provider Used  
If Yes, Housing Provider Company Name:  
Suites  
Accessibility/Special Needs Rooms
Amenities
In-room Deliveries
Room Drops (outside doors)
On-Site Bill Review Instructions
Third-Party Billing Instructions
Use this Section to Give Specific Instructions for Goods and Services that the Event Organiser is not Responsible for (e.g. Contractor’s Expenses, etc.)
Room and Tax to Master
Incidentals to Master
Guests Pay on Own

Arrival/Departure Information
Major Arrivals
Major Departures
Group Arrivals/Departures
Early Check Ins and Late Checkouts

General Requirements
Porterage/Luggage Delivery Requirements:
Hotel Name:
No. of Single Occupied Rooms
No. of Suites
No. of Complimentary Rooms
No. of Staff Rooms
No. of Sub-Blocks
No. of Double Occupied Rooms
Room Block Contracted Date
Final Room Block Date
Cut-off Date
Luggage Storage Requirements
Drive-in and Parking Instructions
Fly-in Instructions
Other Arrival/Departure Comments

Costing
Per Room or Per Person or Sharing Cost
Taxes and VAT

Room Type
1 bed/1 person
1 bed/ 2 people
2 beds/2 people

Housing Management
Early Check In
Later Check Out
Porterage
Luggage Storage
Special Room Requirements
Smoking or Non-Smoking Room
Ground Floor Rooms
Near/or Away from Lift
Parking Costs
Incidentals Management
Blocks on Rooms
Guest Credit Card Required for Holding by Hotel
Disabilities
Sharing or Single Room Requirement
Family Room Requirement
Self-Catering Requirements

**INFRASTRUCTURE MANAGEMENT CHECKLIST**

Infrastructure Management concerns the confirmation, acquisition, or enhancement of inherent or imported equipment and services to ensure sufficient transportation systems, parking facilities, utilities, sanitation and waste management, and emergency response services are in place to meet the functional needs of the event project.

**General Requirements**
- Carpeting/Flooring Requirements
- Electricity Requirements
- Fencing
- Gas
- Generators
- Housekeeping
- Lighting
- Power
- Shell Schemes
- Stanchions
- Telecommunications
- Indoor Toilets
- Outdoor Porta Loos
- Traffic
- Transport
- Waste
- Skips
- Dustbins
- Recycling Bins
- Water
- Room Dividers
- In-house support

**Parking**
- Define Parking for Staff, Trucks, Rigs, Trailers
- Define Parking for Guests
- Define Traffic Patterns
Valet and Staff, shuttle for staff to event
Truck Parking Availability and Protocol
VIP Parking
Valet Parking
Off Site Parking/ Location and Access/ Sufficient Lighting and Security
Guest Drop off point/ ground conditions
Traffic/ Valet Flashlights and Florescent Vests
Valet Parking Tags/ Valet Station
Parking Cones
Fire Lanes

Restrooms
Permanent or Convenience
Location and Number of Units
Supplies
Port-a-Johns (1 per 50 guests)
Lighting
Wash Basins
Handicap Units
Unisex
Tented
Staffed
Layout
Toiletries Required
Type of Unit
No.
Location

Special Services
Truck Dock Heights
Loading In and Out Protocols
Special Trash Pick-up
Lift Operators
Handicap Needs
Plastic Trash Cans with Liners
Emergency Services
Dumpsters Permits
Special Needs for Hearing Impaired
Lift Operators for Signage, Staging, etc.
Citronella Candles/ bug deterrents
Water Truck
Guide Wires
Recycling
Translation Services
LOGISTICS MANAGEMENT CHECKLIST

Logistics Management includes the analysis, sequencing, and supervision of the tasks and providers necessary for the move-in, installation, maintenance, disassembly, and move-out activities associated with the event project.

General Considerations
Transportation/Flights/Transfers
Type of Transport
Shuttle Provided by Venue
Transportation Provider
Shuttle(s) Provided for Off-Site Events
Parking Availability
Shipping
Type and Number of Vehicles
Driver Instructions/ Exact Routes
Signage- Route and Location
Emergency Routes and alternate routes
Continuous Bussing or Shuttle- bus # According to Passengers and Distance
Communication
Lighting @ Entrance and Exit
Handicapped Transportation
Ground Conditions (Inclement Weather)
Platforms or Steps for guests stepping on or off buses
Guide/ Host on Bus
Additional VIP Transportation
Golf Carts
Transportation for Entertainment
Transportation for High End Entertainment - Helicopter/ Limo
Boating Transportation
Valet
Signage for Staff Transport
Luxury Motor Coaches

You will be responsible for gathering the following information in order to plan for the logistics part of the event:

→ Gather all flight arrival and departure information: Arrival and departure day, date carrier, flight number and time.
→ Send individual attendee confirmation documents: Help line number.
→ On-site attendees could receive—arrange for:
  – In-room evening room amenities (i.e., welcome basket, nightly gift reflecting day’s theme, and themed note cards each night, etc.).
  – Departure notices (arrange bag pull).
→ Registration/hospitality desk:
  – On-site check in area.
  – Updated finalized agenda.
– Name badges (ability to change/add on site).
– Confirm room stay and departure info.
– Welcome gift.

→ **Pre-meeting logistics:**
  – Review property layout and amenities.
  – Most important is the personal greeting.
  – Attendee roster.

→ **Negotiate preferred air carrier.**

→ **Site selection:**
  – Review all basics for site inspection with an eye on logistical, aesthetic, and content delivery.
  – Note distance from airport.

→ **Reserve hotel room block:**
  – Secure pre and post extension as required for staff.
  – Note special VIP suite needs.
  – Meal function needs.
  – Detailed review of contract.

→ **Secure meeting space:**
  – Insure availability for stage setup.
  – Speaker rehearsal rooms.
  – Work rooms.
  – Note VIP side meeting needs.

→ **Arrange all food and beverage:**
  – Each event/meal function is unique to itself and an individual flow needs to be created for each event (lunches dinners, breaks, etc.) incorporating theme, quality, polished presentation and service.
  – Function space itself.
  – Music/entertainment.
  – Menu selection.
  – Seating arrangements.
  – Linens/centerpieces.
  – Decoration/ambiance.
  – AV requirements (speaker/toast/welcome/announcements).

**PARKING**

Parking to accommodate guests at an event is an essential part of event preparation. Not only does adequate parking serve to avoid making unhappy guests, it increases event attendance by guests who might otherwise stay away if they must walk a long distance. Inadequate parking can force guests into being exposed to adverse weather, or concerned over issues of safety, particularly when attending those events held during evening hours.
Consider the parking necessary to accommodate guests who will commute to the event as opposed to those that may be lodging in the vicinity. Venue selection will bear heavily on the amount of parking available to accommodate a large number of attendees, bearing in mind if the anticipated arrival of guests will occur all at one time, or as a constant ingress and egress of cars and people.

If the selected venue does not offer adequate parking to accommodate the anticipated number of guests, consider offering transportation from remote parking facilities to the event, to alleviate congestion. Additionally, instructing vendors, delivery trucks, and other event personnel to park in other designated areas will contribute to more free spaces for guest parking. In addition, to be considered is the option of valet parking, which can avail more space within a parking area because of the ability of valet drivers to park vehicles in such a way as to more efficiently use the available parking area.

The employment of personnel to direct parking may become a necessity, particularly when parking in open fields or lawn areas as commonly occurs with outdoor events. Not only does this serve to fill parking areas more expediently, it prevents the spread of cars into areas that might be damaged by motor vehicles, or that may become mired or stuck in low-lying areas prone to filling with rainwater.

Security is needed for parking areas during evening hours, when guests are returning to their vehicles to drive home after leaving the event. More than one unfortunate individual has been molested, hurt or robbed in a dark parking garage or area. They were targeted mainly because of the obvious lack of security.

**LIMOUSINES**

For those special individuals being honoured at an event, there is nothing like a limousine to make them feel appreciated, appear important, and most of all, to arrive at the event on time. Professional limousine services can provide a plethora of limousine packages from one car to many, suitable for a few passengers or a large party. Limousines are normally leased, with a driver included, on an hourly basis

A limousine is a specially altered luxury automobile suggesting wealth, importance, and above all, offering vast amounts of room. This makes the limousine a perfect vehicle for transporting several members of band, honoured guests replete with spouses and friends, or popular celebrities invited to attend an event. The limousine shouts importance upon arrival, causing heads to turn and curious eyes to attempt a peek at the special passengers that ride behind the mask of dark, smoked glass. Limousines likewise offer extreme privacy, capable of hiding intimate moments and clothing changes from intruding or prying eyes.

Leasing a limousine is perfect for delivering key executives to an event, showcasing a winner of a promotional contest, or giving weight to a political candidate. A limousine should also be
considered for transport of company founders, giving special treatment to investors, or collecting visiting dignitaries.

Limousines can be offered with simple fare, such as plush, curved couches that face each other to provide a transportable “living room”. They can also be stocked with the makings for cocktails or the cork popping of champagne toasts, complete with bar and working refrigerator. Stretch Limousines may be capable of holding the entirety of a football team, while yet other specialty limos have even been installed with working whirlpool tubs.

A limousine imparts a magical quality that only a limousine can deliver. Short of arriving in a private jet, a limousine instantly conveys a special message about its passengers, providing a memorable touch for guests honoured at a special event.

### SPEAKER MANAGEMENT

The importance a speaker plays in the success of your event cannot be overstated. Once you have clearly defined the purpose of the event, developed goals, written objectives, chosen a site, and set a schedule you will need to select the right speakers.

#### THE SPEAKER BRIEF

The speaker brief includes information on how certain aspects will be handles at the event. These are especially pertinent if the speaker is an MC at the event.

→ **Speaker Profile:** Get information on how the speaker would like to be introduced to the audience. This is generally limited to 1 – 2 paragraphs.

→ **Time monitoring:** Give them full production schedule and programme outline and make them aware of program time constraints. Indicate if speaker timers, multimedia pointer timers etc. will be available to assist them with time keeping during their presentation.

→ **Managing questions from audience:** Brief them on how questions and answers are to be handled. Do attendees ask questions throughout the presentation or has the event organiser allocated 10 – 15 minutes for Q and A? Are questions pulled up onto screen? Are questions to be tweeted through and then the speaker picks 2 – 3 questions? Discuss this with the speaker.

→ **Speakers to print out copy of the presentation:** Request that the speakers print out their presentation in case there is a problem with their digital, electronic PowerPoint. In most instances presentations are copy written to the speakers and event organisers are not given access to printing these so the speaker must print a copy.

→ **If possible ask for a copy of the presentation before the event:** This will allow you to see if the presentation is too long, not long enough, whether the topic is on point, and whether there is any multimedia that needs to be catered for.
Copyrights on presentation and printing/distributing copies: Ensure you have checked what the copyrights are on all presentations and speaker's materials before you reproduce them.

If the speaker selected is a master of ceremony the event organiser must brief them on the following so that they can communicate this during their introductory/opening welcome. This information is sometimes referred to as “housekeeping”. More detailed information on this can be found in The Event Executive Summary (EES). An alternative to this is to put all “housekeeping” information on the screens as a holding slide so that attendees can view the information.

The following can be included:

- **Cell phone protocols** – Must cell phones be switched off or just put on silent?
- **Toilet location** – If a large convention venue, provide a map/visual.
- **Parking vouchers protocol** – When and how to attendees obtain parking vouchers? Do they collect them at registration when they leave etc.?
- **Security/ evacuation in crisis** – What is the procedure if there is an emergency? This information must be provided to the event organiser by the venue.
- **Smoking areas** - Where are smoking areas are located?
- **Closing the event.**
- **Thank yous.**
- **Wi fi protocol and procedures** – Where do attendees get Wi Fi? Are there vouchers they can purchase? If so, where do they purchase them? If Wi Fi is free, how do they access it?
- **Sponsors** – Are sponsors mentioned? Thanked? If so, provide the MC with information.
- **Breaks and pauses.**
- **Speaker name, surname, title and company.**
- **Speaker topics/ bios/introductory information.**

Speakers are very important for some event types. The function of speakers at an event is to draw in guests who would like to take part in a live session with an expert on topics relating to the event itself. For the company event, the speaker may focus on effective management, human relations, financial matters or future trends. For an educator event, topics may include the parent-teacher relationship, spurring creativity among students, or dealing with bullying.

Speakers’ bureaus provide a bank of talent to make any event a memorable one by providing professional speakers versed in a wide variety of topics. Speakers for an event may be obtained from among company ranks, or from among politicians, entertainers, sports figures or other newsworthy individuals.

A speaker must have the confidence to address a large group, share memorable experiences, offer sage advice, or instruct in established or new technologies. Speakers must also be capable of fulfilling the requirements of speaking for a specified amount of time, having suitable material and presentation skills to keep an audience engaged.
The selection of a speaker or multiple speakers should be in alignment with the overall theme of the event, while meeting the expectations of the attending audience. The cost to engage a professional speaker relies typically on the fees they demand for their speaking performance. This might include lodging and airfare, if the speaker must arrive from a distance beyond comfortable driving range, or if time constraints are prohibitive.

Speakers performing at an event may provide instructional materials in conjunction with their field of expertise; including CDs, DVDs, books, software, and informational literature or signed photographs. If the speaker is a well-known entertainer or sports figure, the opportunity for guests to participate in special get-togethers, book signings, and autograph sessions are not uncommon.

The appeal for guests to privately interact with celebrities through special parties, back-stage gatherings, or high-profile seating arrangements are the substance of promotional contests, often requiring payment of additional fees to the speaker for these extra demands.

- Identifying and sourcing speakers that are appropriate for your event.
- Inviting and confirming speakers in writing so as to avoid misunderstandings.
- Thanking speakers in public at the event.
- Brand custodians and ice breakers.
- Contingency plan for VIPS, celebrities and keynote speakers.
- PowerPoint presentations.
- Negotiating with local and international.

**TECHNICAL PRODUCTION MANAGEMENT**

The organiser must look at the event as an entire production, similar to a theatrical, film or television production. Whether it is self – directed (for e.g. a festival) or carefully controlled (e.g. an awards gala), an event experience is a show or performance, one that is carefully crafted to deliver a message and a meaning.

**SOUND AND AUDIO-VISUAL**

As with any other production technology, the products and equipment used for sound and audio-visual (AV) support are evolving and emerging at a fast pace, and as each new technology enters the entertainment industry it is quickly adopted by the event industry.

The type and scope of technology the organiser will use depends on the needs it will be used to meet. This equipment can range from a simple in – house PA system, with a single microphone on a lectern for a seminar to a full – fledges concert set up with stacks of loudspeakers, stage monitors, amplifiers, image magnification video, and a control console the size of a pickup truck.
AUDIO – VISUAL EQUIPMENT CHECKLIST

- Audience Response Systems
- Audio Amplifiers
- Audio Delay Systems
- Audio Distribution
- Audio Effects Equipment
- Audio Mixers
- Audio Playback Equipment
- Cables/Power
- Communication Systems – Two – Way Radios etc.
- Computer Equipment
- Cameras
- Electronic Whiteboards
- Equalisers
- Interactive Touchscreens
- Monitors
- Loudspeakers
- Lecterns/Podiums
- Microphones
- PA Systems
- Projectors
- Screens
- Sound Consoles or Rack
- Speaker Timer
- Speaker Cue Light
- Speaker Multimedia Pointer
- Teleconferencing
- Teleprompters
- TVS
- Video Scalers and Switchers
- Video Wall Equipment
- Videoconferencing
- Whiteboards

Technical Management includes the acquisition of the necessary and appropriate staging and equipment, and supervision of its installation, operation, and attendant technician personnel, to ensure realization of the production plans of the event project within the physical constraints of the event site.

**General Requirements**

Confirm Onsite Technician

Is your Equipment Mac Compatible?

Will there be a Dedicated Technician in the Room the Entire Event?

Will they be Responsible for the Presentations

Do they Tape down Cables in the Room?

Do they have Back up Equipment and Data Projectors?

Do they have Extension Cables and Plugs?

Do they Control Noise/ and Sound?

**Audio**

PA Systems
Registration Sound
Foyer Sound
Type of Mics
No. of Mics

**Equipment**

Easels
Flipcharts
Lectern
Podium
Monitors
Plug Points
**Front Of House**
Front of House Requirements
Position
No. of People to House
Furniture

**Lighting**
Spotlights
Special Effects
Gobo Requirement
Pin Spots On Centrepieces
Ceiling Treatment Light Requirement
Entertainment Lighting Needs
Lighting Checks
Catering, Director, Lighting Comp.
Av Cue Sheet
Follow Spots
Intelligent Lighting
House Lighting
Control Consoles

**Power**
Power Needed
Secure Generators and Backups
Existing or Temporary
Location
Compliance and Certificates
DB Boards
Inspections
Location

**Production Team**
Stage Hand Call – load out
Riggers
Show Crew
Stage Hand Call - load out

**Staging**
Size/Dimensions
Type: Entertainment or Presentations
Location
Stage Dressing/Skirting
Stage Lighting
Stage Décor and Design
Stage Railings
Stage Stairs
Stage Wings
Mats/Cables/Power

**Trussing**
Front of House Trussing
Rear Trussing/Onstage
Trussing Middle of Area

Visual
Screens
No. of Screens
Type of Screens
Position of Screens
Data Projectors

STAGING

STYLES OF STAGES

- **Trust stage**: The stage projects into, and is surrounded on three sides by, the audience.
- **Proscenium stage**: In this configuration, the audience watches the action through a rectangular opening that resembles a picture frame. Similar to that at theatre.
- **Arena stage**: This type of stage is completely surrounded by the audience and any entrances must be made through the audience to the stage. Stairs to the stage may be placed in the center of each side, on corners, or any other location desired.

STAGE DRAPING

Event organisers frequently neglect to consider what a stage presentation will look like when a stage is placed against a bare wall. Because the stage is relatively low in height, it tends to get lost against the larger area of the wall behind it. For this reason, to assist in creating a focal point, placing a simple drape backdrop behind the stage can make a tremendous difference.

TYPES OF STAGES

- One main stage against the wall.
- One main stage centrally positioned.
- Central main stage with auxiliary stages.
- Floor space as a performing area.
- Vertical space as a performing area: Example Cirque du Soleil type events.
STAGE DIRECTION

Backstage

<table>
<thead>
<tr>
<th>Up right</th>
<th>Up center</th>
<th>Up left</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right center</td>
<td>Center stage</td>
<td>Left center</td>
</tr>
<tr>
<td>Down right</td>
<td>Down center</td>
<td>Down left</td>
</tr>
</tbody>
</table>

Audience

Figure 32: Stage Direction

PLACEMENT OF STAGE

Are audience members going to be standing or seated?

- Horizontal.
- Vertical.

AV EQUIPMENT

- Cables and connectors for equipment.
- PA systems which include speakers, microphone and mixer.
- Writing aides:
  - White boards and flip charts.
- Presentation assistance:
  - Data projectors (front and rear).
  - Laptop.
  - Multimedia pointers.
  - Laser pointers.
  - Memory sticks.

Some facilities, such as conference centres, offer the luxury of built-in audio visual (AV) capabilities that often contain highly sophisticated equipment. Let your presenters know what room setup you have organised, and then ask whether they have any specific needs. Speakers often prefer certain types of equipment.
The most common microphones setups are:

- **Podium microphone** which is attached to the podium and has an adjustable arm. Speakers can position notes in front of them and are generally more comfortable.
- **Table microphones** are used when the speaker is seated at a table. These are commonly used in panel discussions and allow each speaker to have their own microphone.
- **Standing/aisle microphones** are used by entertainers. These are placed in the aisle so that during a question and answer session, participants can walk up and speak directly into the microphone for all to hear.
- **Hand – held microphone** which is for speakers who don’t need the use of their hands during their speeches and presentations.
- **Lapel microphones** are small and easily clip onto clothing, preferably close to the speaker’s mouth as possible. They can be cordless or wireless and are fantastic for speakers who use their hands. For the best audibility ensure speakers don’t turn their heads away from the microphone.

**SCREENS AND PROJECTION**

**Front projection:** This type of projection takes up less space than rear projection. However there is a greater chance of light interference from other ambient sources such as stage or house lighting. This type is less difficult to set up.

**Rear projection:** This type of projection eliminates chances of audience members casting shadows on the screen when walking in front of the projector and it is less prone to ambient light interference. It does however require a larger set up space behind the screen for projector setup and this area must often be cordoned off and even curtained off to minimise light spillage. You will need a special rear projection data projector.

**Types**
- **Tripod:** These are for front projection only. The fabric pulls up and out of a metal cradle.
- **Fast fold:** These consist of a fabric that snaps to a rigid aluminum frame.
- **Inflatable screens:** Used for outdoor events.

**Monitors**
- Video walls.
- LED Screens.
- Teleprompters.
- Water screens.
EQUIPMENT AND LIGHTING POSITIONING

- If you are only using one screen, ensure that it is to the right of the speaker. Capitalize on the natural reading movement of people - from left to right.
- The podium will therefore be placed on the audience's right hand side on the stage.
- For audiences that exceed 80 people use two screens for better visibility.
- For audiences greater than 500 people it is advisable to project the speaker’s faces onto the screen so that everyone can see them on stage.
- Avoid feedback image – which is when the speaker walks in front on the projector and it projects his/her image. This can be overcome by using venues that have projectors built into the ceiling. Alternatively you can use rear projection.
- Seat the audience no closer than twice the screen’s height as this prevents feelings of claustrophobia for both the speakers and the audience.
- Don’t leave your meeting participants in the dark. Good lighting is essential to a good event, particularly when it includes a visual presentation or speech. Your goal is to light your event room unequally.
- For a keynote or general session, most of the light ought to be channeled onto the main presentation area enabling the audience to see as much of the presenter’s facial features as possible. To avoid creating a spotlight effect and blinding your speaker, use cross lighting with two separate lights, one on either side of the presentation area. Less lighting is needed on the audience.
- For a presentation where participants are expected to take notes, allow enough lighting to cover the audience so that they can do this without strain. You should have no light directly above or on any screens or monitors showing slides or other video/computer presentations. Definitely avoid florescent lighting near screens and monitors because this washes out any of the images you want to project.
- Ideally, you should be able to control and dim individual lights in the event room. It you can’t control the lighting; you can arrange to have venue management unscrew specific bulbs ahead of time to achieve the desired effect for the event. Remember to avoid any washed – out images on a screen.

TIP: If you have the space to do this at your event – use rear projection. This is when the data projector is placed behind the screen. The benefits here are that no projectors and cables are visible and it looks more dynamic and clean cut.

LIGHTING

Lighting is the lipstick of your event décor! It is crucial for your event. It affects the mood and the atmosphere. Lighting discriminates between where the show is happening and where it is not. Lighting is the opposite of masking. It says, ‘Look here’. The most important job that lighting has is that it provides illumination.
You must consider what the objectives are for the lighting:

- Visibility.
- Relevance.
- Composition.
- Mood.

Only then can you start considering what types of lighting to use and where.

There are different lighting terms:

- **Beam**: The illumination emitting from a single lamp or luminaire.
- **Flood**: A wide or large beam.
- **Focus**: The aiming of a beam in the desired direction.
- **Gel**: A thin colour filter (gelatin, polyester, polycarbonate), placed in the luminaire to change the colour of the beam.
- **Gobo**: Derived from go between. A cut or etched metal stencil placed between the lamp and the lens in a focusable spotlight. Also allows graphic images and photos to be projected.
- **PARcan**: A high – intensity, low wattage lamp mounted in a round frame resembling a can.

**Good lighting designers must be competent in three areas:**

1. They must be technically competent with equipment.
2. They must be operationally competent, organised, and capable of handling resources and risk management.
3. They need to understand the aesthetic principles of good lighting design.

**LIGHT LEVELS**

If you want to bring attendees’ focus to a specific area, using light to give a logo, speaker, or product prominence, you can raise the level of light in that area or on that object or you can lower the level of light around it. The two most common light level problems are not having enough light in work situations and having too much light in party situations.

Speakers are easier to hear if they are well lighted. This is the case because we “hear” a certain amount with our eyes by reading body language and seeing the way lips form words. Also, the speaker will have our attention if he/she is the brightest object in the room.

Celebrations and social gatherings generally require a low level of ambient light (general environmental light), which creates a relaxing ambience (atmosphere or mood). Pin spotting flower arrangements on guest tables has become very popular.

**SHOW SET UP AND SOUND CHECKS**

The last but by no means the least critical aspect of scheduling and timing, excluding the show content itself, is the time and method of setup, sound checks, and rehearsals for performers.
If the show is complex and involves several acts that are dependent on each other, then at least one full technical rehearsal with audio lighting, AV, and complete performance, should be scheduled. Without one, the show has an increased likelihood of failure.

For shows with unconnected entertainment presentations, a full rehearsal is usually not required; however, full set up and sound checks are still needed. If performers are to take place from a single stage and there are multiple acts sharing the stage, then there is a correct and efficient way to execute the setups and rehearsals, for all the groups, and that is to work in ‘backward performance order’. This means that the last act scheduled to perform will set up and sound check first, followed by the second last act etc.

When the last act has completed setup and sound checks, the stage is ‘spiked’ or taped with small X’s that indicate the correct placement location for pieces of equipment and then their equipment is struck and stored beside the stage in reverse order to their scheduled performance so that their equipment is farther from the stage than the act before them. The last act to sound check is then the first performance.

**USING EVENT SPACE**

Considering that an event space is three – dimensional, it makes logical sense to stage as much entertainment in as much of the space as possible. Ensure that all audience members have an optimum view of the show, rather than placing it all on a single main stage that only those close enough can see well. If space and budget permit, it is preferable to use one or more auxiliary stages for short segments of entertainment

By doing this you include more of the audience members, thus connecting the entertainers and the guests – therefore more engagement. It also allows easier stage changeovers without undue attention so that the show in its entirety becomes more seamless. Having entertainers enter and exit from many doors rather than one all the time, allows the audience more opportunities to feel part of the show by being close to the performers.

**MUSIC LICENSING**

There is no doubt that music adds to the atmosphere of a meeting. Unfortunately, music also can be a liability risk if its use is not properly planned. When copyright laws protect the music used by an organisation at an event or meeting, the organisation may be legally required to get a license, or in other words, written permission for its use. Failure to do so can result in lawsuits and fines against the meeting or event sponsor.

Copyright laws prohibit an organisation or individual from using copyrighted music at a public performance without a license from the copyright owner. The law defines "public performance" broadly, to include virtually any setting outside a group of family and friends.
The copyright law may apply whether the music used is live or pre-recorded, background or primary entertainment, and whether or not the event is restricted to members or employees. The organisation hosting the event is the one legally responsible for copyright license compliance.

*For example*, while a hotel may have a license for the use of music in its lounge and other public areas, that does not remove the meeting planner's responsibility for getting a license for an event or meeting being held in the hotel's ballroom. Likewise, if a planner hires a DJ to play music at a reception, the legal responsibility for getting a license for the public performance of music falls to the planner, not the DJ. However, this does depend on whether or not the music being played or performed is for a public or private event. BMI, one of the agencies that license music, defines a private event as one with ‘close family and/or friends’. This would allow a planner to reasonably assume a private party (non-corporate) or wedding would be exempt from music licensing.

Music licensing is a complicated process. By contacting SAMRO you will be able to protect yourself and counsel your clients on the appropriate steps to take to assure compliance.

**WAY FINDING MANAGEMENT**

Management of signage required for all areas at the event including information, directional, liability and registration signage.

The event organiser must ensure that the attendees or guests can navigate their way to and through the event site. Such help should start with the information provided in the invitation or instructions, including maps and directions, but it usually must be supplemented with on-site signs. Again, it is a matter of anticipating the attendee’s needs and providing answers before they have to be asked.

**General Requirements**

- Information Signage
- Program Start and Finish Times
- Way Finding Signage
- Directional Signage
- Toilets/Restrooms
- Health And Safety Signage
- Liability Signage (Parking Areas, Entrance Areas, Registration Areas and Inside Venue)
- Information Desks
- Holding Rooms and Event Organisers Office
- Designated Load In And Loud Out Areas
- Registration (Alpha Signage)
- Registration Signage (A – B, C – D Etc.)
- Designated Smoking Area
- Reserved Areas (Seating, Etc.)
- Transportation (Directions, Etc.) (Bus Numbers, Hotels)
Step Six

Approval Stage Gate Phase
COVERED IN THIS SECTION:

APPROVAL STAGE GATE
CHAPTER 8: STEP 6 APPROVAL STAGE GATE

**Approval Stage Gate:** This is the stage used to describe a point in a project or plan at which development can be examined and any important changes or decisions relating to costs, resources, profits, etc. can be made before moving onto the planning and design stage. The client will confirm that they are satisfied with the initial concept and proposed event strategy. Changes and modifications cannot be made after this point. Should amendments be required this will form part of a new agreement/scope and budget.

Ensure client signs off the following areas in the checklist below.

<table>
<thead>
<tr>
<th>APPROVAL STAGE GATE</th>
<th>THE FOLLOWING MUST BE APPROVED BEFORE ANYTHING CAN BE IMPLEMENTED:</th>
<th>Client to Sign off Entire Event Plan.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agreed upon Quantities/pax.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Date.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Venue.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Vendors.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Budget.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Timing Schedule.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Administration.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Design.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Marketing.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Operations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agreed upon Risk Management.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approved Scope.</td>
<td></td>
</tr>
</tbody>
</table>

**CLIENT TO SIGN OFF**
Step Seven
Implementation Phase
COVERED IN THIS SECTION:

INTRODUCTION
CONTRACT MANAGEMENT
CONTRACTING WITH VENDORS
CONTRACTING WITH THE VENUE/SITE
BANQUET EVENT ORDERS (BEOS)
THE EVENT EXECUTIVE SUMMARY
INTRODUCTION

The project takes shape during the implementation phase. This phase involves the construction of the actual project result. Programmers are occupied with encoding, designers are involved in developing graphic material, contractors are building, and the actual reorganisation takes place. It is during this phase that the project becomes visible to outsiders, to whom it may appear that the project has just begun. The implementation phase is the doing phase, and it is important to maintain the momentum.

At the end of the implementation phase, the result is evaluated according to the list of requirements that was created in the discovery phase. This phase is complete when all of the requirements have been met and when the result corresponds to the event plan.

Those who are involved in a project should keep in mind that it is hardly ever possible to achieve a project result that precisely meets all of the requirements that were originally specified in the discovery phase. Unexpected events or advancing insight sometimes require a project team to deviate from the original list of requirements or other design documents during the implementation of the project. This is a potential source of conflict, particularly if an external client has ordered the project result. In such cases, the client or event organiser can appeal to the agreements that were made.

As a rule, the requirements cannot be changed after the end of the Approval Stage Gate phase. This also applies to designs: the design may not be changed after the design phase has been completed. Should this nonetheless be necessary (which does sometimes occur), the project leader should ensure that the changes are discussed with those involved (particularly the decision-makers) as soon as possible. It is also important that the changes that have been chosen are well documented, in order to prevent later misunderstandings.

Implementation: Is the phase when all the goods and services are contracted and coordinated, synchronizing all the operational and logistical requirements of an event project. Risk management techniques are required during this phase to ensure the proper verification and control activities are employed.

This stage includes the implementation of all planning strategies. During Implementation the event operations manual must be completed. This informs everyone working on the project as to what will be done, the time it will be occur and all details pertaining to the event. Complete the categories below, as well as add in any that are unique to your project. This will then be sent to the Client, Company, Vendors, Venue and Speakers.
Contracts are a very complex part of your business. Please consult a qualified attorney to review any contract you intend to use.

A contract is really nothing more than an offer and an acceptance for consideration that results in a binding agreement between two or more parties. You can use an attorney to help you prepare your contract, but as long as it is fairly straightforward using common sense language (and no terms are illegal), you should be able to write most of it yourself and then have your attorney look it over. You will be using contracts on a regular basis with your clients as well as your vendors and suppliers in order to protect your best interests. The elements required in these contracts will vary depending on the circumstances.

LEASES, CONTRACTS AND AGREEMENTS

When booking suppliers, you would need to contract with them on various issues.

A large part of event negotiation concerns the resources used to create the event. They can be divided into:

- **Standard Resources** - the negotiation for standard resources is straightforward, as most of the constraints and parameters are already known. For example in hiring a venue there will be a standard contract. The event organiser needs to know the contract terms and the history of the use of these resources at events.

- **Customised Resources** - these are specialist resources created for the specific event. There may not be a standard contract or process. In this case the negotiation has to be well researched with risk and contingencies thought out.

We will now look at four examples of possible contracts, namely:

2. Vendor Contract.
3. Venue Hire Agreement.
4. Speaker Engagement Contract.
Example 1: Booking Agreement Contract

This agreement is made on MM/DD/YY between ______________________ (hereafter "Presenter") and __________________ (hereafter "Performer"), represented in this matter by ____________________ (hereafter "Manager") acting as Performer's agent. Presenter hereby engages Performer to provide the Performance generally described below under the following terms:

All persons engaged to provide the Performance are named in Attachment A.

The Manager's name, address, telephone number(s), and email address are:

The Presenter's name, address, telephone number(s), and email address are:

The date and time of the Performance are:

The Performance shall take place at:

The Performance shall commence at HH:MM am/pm and end at HH:MM am/pm. An intermission lasting X minutes shall be taken by Performer approximately Y minutes after the Performance commences.

The general description of the Performance is:

Presenter shall pay to Performer or Manager the sum of RX immediately following the end of the Performance. Payment shall be by check payable to __________________________. Any tips or other payments made to Performer by third parties shall not be deducted from this fee.

Presenter shall make every effort to prevent any recording or transmission of the Performance without the written permission of Performer or Manager.

Presenter and Performer shall be excused from their obligations hereunder in the event of proven sickness, accident, riot, strike, epidemic, act of God or any other legitimate condition or occurrence beyond their respective control.

Presenter shall be entitled to use the names, likenesses, and other promotional materials provided by Performer or Manager for the purpose of promoting the Performance and attracting attendees.

Presenter shall provide adequate parking space within X feet of the entrance nearest the stage entrance and shall reserve such parking space for Performer's exclusive use from four hours before the starting time of the Performance until three hours after the Performance's ending time.

____________________________________
Presenter's signature and date

____________________________________
Performer's or Manager's Signature and date

____________________________________
Presenter's printed name

____________________________________
Performer's or Manager's printed name

Example 2: Vendor Contract

The parties to this contract are ______________________ (hereafter "Host") and ______________________ (hereafter "Vendor").

Whereas, Host is hosting an Event known as ______________________ to occur at ______________________ on MM/DD/YYYY, beginning at HH:MM am/pm, and has the right to license concessions to vend at and during the Event, and

Whereas, Vendor desires to vend ______________________ at and during said Event, and

Whereas, Vendor has paid Host the sum of RX for a license to vend at and during said Event,

Now, therefore, the parties agree as follows:

1. Vendor shall have access to the location agreed upon by the parties no less than X hours before the Event's commencement for the purpose of setting up Vendor's vending station, goods, and other things necessary and reasonable to vending at the location.
2. Vendor shall not vend any goods or services other than those described herein at and during the Event without the Host's written consent.
3. Vendor's vending station shall be no larger than meter or taller than X meter; shall be clean and orderly; and shall comply with all applicable laws and regulations.
4. Vendor's staff may announce the availability of the goods to be vended only while they are within the confines of the vendor's location.
5. Vendor's staff shall be clothed and groomed in a clean, neat fashion and shall conduct themselves in an orderly fashion.
6. The vendor's staff shall not use loud music, noise, or sound amplification devices at the location.
7. Vendor shall have access to the location for up to X hours after the Event's conclusion at HH:MM, to dismantle and remove all things brought to the location by Vendor. Vendor shall leave the location clean of trash and substantially in the condition it was before Vendor occupied it.
8. Vendor hereby agrees to indemnify and hold harmless the Host against any damages or claims that may arise in connection with Vendor's presence at the Event and Vendor's activities of any kind.

In witness to their agreement to the terms of this contract, the parties affix their signatures below:

____________________________________
Host signature and date

____________________________________
Vendor signature and date

---

Example 3: Venue Hire Agreement

This contract for the rental of a venue is made this day, MM/DD/YYYY, by and between
_______________________________________________, hereafter referred to as the Owner, and
_______________________________________________, hereafter referred to as the Renter.
Whereas, the Renter desires to temporarily rent, occupy, and make use of the Owner’s venue, located at
__________________________________________ and known as 

Whereas, the Owner agrees to such rental, occupation, and use in consideration of certain payments and covenants herein enumerated;

Now, therefore, the parties agree to the following terms and conditions:

1. The Renter shall pay to the Owner the sum of

R__________________________________________________________________ (recommended: 30 days before the commencement of the rental period). Of this amount,

R____________________________ is a non-refundable deposit that will be applied to rental charges upon final settlement of accounts. The remainder, 
R__________________________________________________________________, is a damages/security deposit which will be returned to the Renter upon settlement, minus any charges for actual damages done to the venue by Renter or his/her associates.

2. The Renter shall have access to and use of the venue from noon on MM/DD/YYYY to noon on MM/DD/YYYY for the purpose of hosting the Renter’s ____________________________ event. Owner shall provide to Renter all keys, access control codes, and other items necessary to give Renter such access no later than MM/DD/YYYY.

3. The full rental fee for the use of the venue described in (2) above shall be

R__________________________________________________________________. The balance of the rental fee due, less the non-refundable deposit described in (1) above, shall be payable to the Owner upon the expiration of the rental period described in (2) above.

4. Within 24 hours of the rental period's expiration, Renter shall tender to Owner the rental fee balance due, and all keys and other access control devices in his/her possession.

5. Renter shall remove all personal property, trash, and other items that were not present in the venue when Renter took control of it.

6. Upon Renter's completion of his/her obligations under (4) and (5) above, the Owner shall return to Renter the security deposit minus any amounts deemed necessary to repair damages, inflicted upon the venue by Renter and/or Renter’s associates, guests, invitees, contractors, and all other persons whatsoever who enter the venue during the rental period,
whether or not such persons did so with Renter's knowledge or consent.

7. In the event that Renter fails to pay the balance due within the time period agreed upon in this contract, interest shall accrue upon the unpaid balance at the rate of X% per year until it is paid. Renter shall also be liable to owner for any legal fees, court costs, and other expenses associated with collection.

8. Renter will be liable for any physical damages, legal actions, and/or loss of reputation or business opportunities that Owner may incur as a consequence of the actions of Renter or any of Renter's guests, while Renter is in control of the venue, and shall indemnify and hold harmless the Owner against any and all legal actions which may arise from Renter's use of the venue.

9. Any disputes arising under this contract shall be adjudicated in the Owner's local jurisdiction.

In witness of their understanding of/and agreement to the terms and conditions herein contained, the parties affix their signatures below.

Both parties whose signatures appear below hereby warrant that they are fully authorized and entitled to enter into this agreement, and do so agree on the dates written below by affixing their signatures below.

_____________________________________________
Renter's Signature and date

___________________________________
Renter's Printed Name

_____________________________________________
Renter's Address

_____________________________________________
Owner's Signature and date

_____________________________________________
Owner’s Printed Name

_____________________________________________
Owner’s Address

Example 4: Speaker Engagement Contract

This contract is made and entered into on MM/DD/YYYY by the parties named below as Client and Speaker.

Speaker's Information:
Speaker's Name or Business Name:

_____________________________________________

Address:

_____________________________________________

Phone number: __________________________________
Fax number: __________________________________
Email: ________________________________________

Client's Information:
Client's Name or Business Name:

_____________________________________________

Address:

_____________________________________________

Phone number: __________________________________
Fax number: __________________________________
Email: ________________________________________
Topic: __________________________________________
CONTRACTING WITH VENDORS

After you have qualified your vendors, agreed on the services and pricing, next you will want to execute a contract. It is vital to include every possible scenario (as listed above) that you can think of, along with your expectations and the consequences of non-performance, in each contract you negotiate.

Even if your vendor requires you to sign their standard contract, you should still attach, as a part of that agreement, your own considerations. And, even if you know this vendor and have worked with them in the past, you still are obligated to protect yourself and your client by having a contract.
Every agreement will be different with its own languages and nuances, jurisdiction and conflicts of law, but all should include the following basics:

- The name, location, date and time of the event.
- The name of who is doing the contracting (either you or your client), and the name of the business you are contracting.
- A list of the specific pieces of equipment that will be utilized for the job.
- How substitutions and change orders will be handled.
- The number and type of staff who will work the event as well as your expectations for those individuals.
- When, exactly, they will arrive, set-up, tear-down and depart the facility and what happens if they are unable to access the facility at those times.
- Non-compete clause if you don’t want the vendor to be able to contract directly with your client on future events.
- Liability for damages to the equipment (both theirs and other equipment that will be in the venue) and to the facility itself.
- Damages for breach of contract, including clauses for non-performance as well as consequential damages.
- Where the contract jurisdiction lies (in your home city/state or theirs).

As an attachment to the contract, you should include an event overview, complete with the purpose statement and all the other information discussed including the theme, information about the guests, host, location and other relevant vendors and suppliers. While this has nothing, really, to do with the legal requirements, is does help make sure my vendor understands where they fit into my event and puts everyone on the same page.

You may choose, depending on the type of vendor or supplier, to forego a formal contract and opt for a letter of intent instead. The basic elements are the same, and as long as the content is fairly straight forward, should adequately protect your interests. Be sure to have the vendor sign and date the letter and return it to your file.

CATERING CONTRACTS

In addition to the basic contract inclusions listed above, catering contracts should specifically include:

- The date, time, location of the event, and hours of service provided by the caterer.
- The date that you need to provide the final head count.
- The list of services provided (e.g. buffet, sit-down meal, bar service, wedding cake service, etc.).
- The menu that you have selected.
- The number of wait/serving staff (or a ratio), service style and how they will be dressed.
- The fees, including any extra expenses, a payment schedule, and when the final balance is due.
- The name of the caterer handling the event.
- The caterer’s cancellation policy.
ENTERTAINMENT CONTRACTS

Below is a listing, with explanation, of a variety of types of contract agreements and supplemental documents that can be used when booking your bands and entertainers.

Letter of Confirmation:
There are those times when a formal performance contract may be inappropriate or unnecessary. This type of document is friendly, yet describes the details of the booking agreement fully. It’s written in paragraph, letter format and it includes the essentials (such as performance time, date, place, producer, and artist), who provides what and who is responsible for each item included.

This type of letter may be used with organisations and individuals unaccustomed to music business industry standards, such as charities and private parties for example. The key here is to have a written record of all the important details and for each party to have a signed copy.

Performance Contract - Non-Union:
A performance contract includes the same information as a letter of confirmation except that it is written using legal art language or legalese. Rather than business letter paragraphs, the contract often has numbered paragraphs and is more formal. If you are working with clubs, universities and concert halls or for concert promoters, a performance contract with the entertainment’s management company or booking agent is recommended.

Performance Contract Rider:
The purpose of including this document is to help define exactly what is required for the artist to present their best performance. It serves as an extension of the performance contract to aid the promoter in taking care of all the details. You should scrutinize contract riders and cross out unnecessary items that serve only to inflate your budget or take undue advantage.

Technical Rider:
This document details the artist's sound, lighting and stage requirements. It should be attached to the performance contract with instructions to have copies distributed to the appropriate technical personnel at the venue.

Stage Plot:
It is a detailed layout of the stage with all the sound equipment and instruments positioned. The stage plot should accompany the Technical Rider.

Lighting Plot:
This diagram describes the type and placement of lighting that best highlights the performance. It may include song lists and lighting cues.

Hospitality Rider:
This describes the artist's food, housing and travel requirements. This is the place where you will find dietary restrictions and necessities when meals are provided.
When negotiating with a name band or national act, there are several provisional aspects to the contract that will be determined by the type of engagement you are hosting. For every event, there will be a deposit which is a portion of the guaranteed fee. Deposits are generally returned with a signed contract. Any percentage of the guarantee may be a suitable deposit, though 50% of the guarantee is the norm. Deposits are legally supposed to be held in an escrow account until the date is played. Should anything happen to cause the date not to be played, the deposit may have to be returned depending on the contract agreement.

If it is a ticketed event, the booking agent will likely negotiate a piece.

This may be in the form of:

- **Straight Percentage.** An agreed upon portion of 100% of income from ticket sales. The larger portion of the percentage generally goes to the artist. A reasonable artist percentage is 65%. The negotiation points in a percentage deal are the actual percentage and to know whether it is a percentage of the gross or the net.
- **Guarantee Plus a Percentage.** Artist gets a base guarantee, plus some percentage. Most often these deals are based on a percentage of the net, but it depends on the deal. You certainly can try to get a percentage of the gross.
- **Guarantee versus Percentage.** Artist gets a base guarantee or an agreed upon percentage of the income whichever is greater.

**INDEPENDENT CONTRACTORS**

There are two instances where you will want to have your vendors or suppliers sign a supplemental Independent Contractor agreement to your contract.

**If they are:**
An individual freelancer.
A business that is not incorporated (you may have to ask them).

Your Independent Contractor agreement should include the following elements:

1. **Services to be Performed.** Contractor agrees to perform the following services for Client: [description of services]
2. **Time for Performance.** Contractor agrees to complete the performance of these services on or before [date].
3. **Payment.** In consideration of Contractor’s performance of these services, Client agrees to pay Contractor as follows: [Description of how payment will be computed] Contractor is responsible for any taxes or payments due to any governing body as a result of this contract.
4. **Invoices.** Contractor will submit invoices for all services performed.
5. **Independent Contractor.** The parties intend Contractor to be an independent contractor in the performance of these services. Contractor shall have the right to control and determine the method and means of performing the above services; Client shall not have the right to control or determine such method or means.
6. **Other Clients.** Contractor retains the right to perform services for other clients. [Insert non-compete clause if warranted].

7. **Assistants.** Contractor, at Contractor's expense, may employ such assistants as Contractor deems appropriate to carry out this agreement. Contractor will be responsible for paying such assistants, as well as any expense attributable to such assistants, including income taxes, unemployment insurance, and social security taxes, and will maintain workers' compensation insurance for such employees.

8. **Equipment and Supplies.** Contractor, at Contractor's own expense, will provide all equipment, tools, and supplies necessary to perform the above services, and will be responsible for all other expenses required for the performance of those services.

9. **Non-Compete Clause.** You may also wish to add to any of your agreements, whether a vendor or independent contractor, a non-compete or also called covenant not to compete clause. This may help protect you from a subcontractor trying to work directly with a client you previously secured.

It may be worded similarly to the paragraph below:

Contractor shall not, for a period of ________ year(s) after the date of this contract agreement, solicit orders, directly or indirectly, from "[Click here and type client's company name]", a direct client of "[Click here and type your company name]", or from any customers of its successor, for such products/services as are sold by "[Click here and type client's company name]" or its successor, either for ________ (himself or herself) or as an employee of any person, firm, or corporation.

**CONTRACTING WITH THE VENUE/SITE**

Contracting with your venue, be it a hotel or other type of event space, requires a thorough understanding of the terms and negotiation points used.

First you will need to determine who will be signing the venue contract. Scenarios could include:

- You negotiate and work through the details with the venue and the client signs the final contract. The client is responsible for all contract terms including payment.
- You are an independent contractor under authority of the client to negotiate, detail and sign the contract. The client is responsible for all contract terms including payment, but you may have some liability here as well. (Contract is usually signed Your Name, as authorized agent for Your Client).
- The client negotiates and signs the contract, but you work through the details and BEO's. The client is responsible for all contract terms including payment.
- You do all the negotiating and details and sign the contract. You are responsible for all contract terms including payment.
What arrangement works best will depend on the situation. Under most circumstances, it will be to your advantage for the client to be responsible for the venue contract. This will better protect you in the event of damages, attrition or other circumstance beyond your control and hold the client accountable for payments and deposits due to the facility.

You should negotiate and sign the contract yourself if you are completely reselling a package to your client, and do not want to divulge your actual arrangements and cost with the facility. This makes you 100% responsible for the terms, payments and deposits. The best protection under this scenario is to have an iron clad contract with your client that protects your interests in regard to your venue contract.

When a planner and hotel negotiate a contract, the intent of the parties is twofold: to stipulate all performance terms and to settle on all mandatory fees, rates, and costs. Here is the procedure for contracting with a venue or facility with specific references to contracts regarding sleeping rooms:

Upon agreement of terms, the facility will produce an initial contract and provide a first draft to the planner. Planner will make changes by lining out unacceptable or incorrect terms and penciling in the amendments and initialing beside each change. You may also add a typed addendum with your own provisions, if necessary. Then the entire packet is returned to the facility.

At this point they may accept it “as is", initial beside the changes you made and tender a final draft. Otherwise they may make more changes and the document will continue to go between the two parties until a final agreement is made. Both parties receive a final copy of the contract for their permanent records. Usually within thirty days of signing, you’ll be responsible for making an initial deposit to the facility. The amount varies, but may be as much as half of the total projected expenses. Once the business is secured, the facility will begin to work with you on the specifics of the event detailed in the Banquet Event Orders (BEOs).

**BANQUET EVENT ORDERS (BEOS)**

Banquet event orders are prepared by the facility and are used to distribute the detailed information about your event to all parties involved. These are always considered part of the total contract you have with the facility so it is important that the information contained therein is completely accurate.

After you have worked with the sales staff, catering department, chef and other operations at your event facility and determined the specifics for your event, you should receive your copy of the BEOs. These are usually completed approximately 4 to 6 weeks prior to your event (if you have that lead time). You should review them carefully and make any changes. Pay particular attention to the dates, set-up times, configuration and pricing to make sure it coincides with what you initially agreed upon. Once you’ve made all your changes, give it back to the facility to revise and request an updated copy.
This may go back and forth several times until it is 100% accurate. BEO’s are fairly standard from venue to venue.

**Here’s the type of information to check in your BEO’s:**

- Across a standard form will be the venue’s name, address, phone and fax along with the page number, BEO number and sometimes Folio number (which is the billing account). Always make sure you have received all pages of your BEO.

- Toward the top you’ll also find the event date and your contact person – usually the one who prepared the document. Confirm the event date is correct. Some will also list the event contact person (you or your client), mailing and billing address.

Next you’ll find the method of payment arranged for your account and any deposit amounts that have been made. If you have not previously established a billing account, you will be responsible for total and final payment at the conclusion of the event. Look for the time frame for the hotel’s or venue’s guarantee – this is the final number of guests the hotel will prepare and charge you for. This information is usually due to the venue 72 hours prior to the event, but does vary.

Under that you’ll find the event dates, set up times and room assignments in a grid form. Pay close attention to the set-up times listed to make sure they match your schedule. Next is the type of function, which is abbreviated (BFK stands for breakfast, BUF for buffet, etc.), followed by expected attendance (EXP), guarantee number (GTD), set (which is how the room is to be laid out – theater, buffet, etc.) and room rental amount.

The BEO then is usually divided into columns or sections. Under set up you’ll find information about the time and any special set-up requirements including audio visual, head tables, dance floor, etc. Specific charges will also be listed here.

Other information that might be detailed includes special arrangements (like accessing the room early or having an electrician on hand), parking, security and who has authority to sign the master bill.

On the menu section, it will detail the food and beverage requirements for this specific function and the costs. Here you will also find the ‘plus-plus’ information for tax and service charge. Make sure it matches what you were quoted and don’t forget to figure the tax and service into your total budget.

There should also be any other specific provisions or charges listed here including your food and beverage guarantee slippage limits (how far under your guarantee you can fall before being charged), and your food and beverage minimums before other charges (like bartenders or room rentals) kick in.
Somewhere on this document, often in small print, you’ll find the general attrition clause. It might read something like: “All groups who must cancel less than 90 days to the event date are subject to a cancellation fee equal to the peak number of guest rooms x room rate, full meeting charges and ½ the projected food and beverage revenue.” Attrition clauses can often be negotiated but this must be done well before you get to the BEO stages. If the attrition clause listed on the BEO is different than what was agreed, be sure to scratch it out, write in the correct terms and initial before you return your BEO’s for correcting.

Once your BEO’s are complete, they will be given to every department within the facility so they are aware of the part they play in the success of your event. A few days prior to your event, it is always wise to request one final copy of the BEO’s as they are to be distributed so that you can give them one final look and also give them to your staff. It is much better to catch problems now than find them the day of your event.

**THE EVENT EXECUTIVE SUMMARY**

The following components might be included in the event executive summary:

- **General Overview**: Group name, day(s) and date(s), contract details pertaining to the meeting, information about the organisation (including attendee profile and objectives).

- **Event Profile**: Event name, start and end dates of event, pre – and post – event dates and locations.

- **Meeting Requirements**: By day, time, and place – include floor plans of the meeting room design, audio visual requirements, function name, name of room and floor number, expected attendance, number of speakers, staging requirements, special requirements, signage, meals, accommodation etc.

- **List of Key Personnel**: This includes contractors/suppliers/meeting staff/VIPS and hotel staff.

- **Meeting Policies**: Include all policy statements of the organisation as they relate to the meeting.

- **Staff Responsibilities**: Each staff member should be listed with specific on – site responsibilities and a schedule of times and days of involvement.
## EVENT OPERATIONS EXECUTIVE SUMMARY: EXAMPLE

<table>
<thead>
<tr>
<th>AREA</th>
<th>DESCRIPTION</th>
<th>TIME</th>
<th>DETAIL</th>
<th>TECHNICAL, AV, EQUIPMENT, FURNISHING and VENUE REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLEANING</td>
<td>Sun City to clean the Superbowl on Tuesday evening.</td>
<td>12:00 – 06:00</td>
<td>Exhibitors are responsible for ensuring their stands are clean. Common areas are for Sun City to clean. All areas are to be ready and cleaned before doors open on Wednesday (06:00).</td>
<td></td>
</tr>
<tr>
<td>DRESSCODES</td>
<td>CCCVVS</td>
<td>Full Duration</td>
<td>SHEEBEEN EVENING: Casual EXPO: Business Attire GALA DINNER: Cocktail attire CONFEX DAY 2: Casual Thursday, Branded T-shirt and Jeans With trainers</td>
<td></td>
</tr>
<tr>
<td>EMCEES / SPEAKERS</td>
<td>MC X</td>
<td></td>
<td>GENERAL HOUSE KEEPING Trade bag drops Delegates can drop off their promotional bags at Registration Kiosks. Smoking areas Sky Bar only Bus stop sessions Wi Fi Vouchers – For delegates own account but can be purchased at business centre at the Cascades on the 4th floor. Dedicated Technician to Help Speakers with Presentations at all Times Event Outline Copy of Program Attached Speaker/MC Welcome and House Keeping Emergency Evacuations Toilets</td>
<td>MC X REQUIREMENTS She has requested a teleprompter as well as a specific Autocue (spelling?) operator. She will revert to me with this person’s details. I have phoned Andy already and he will send me some updated costs for the teleprompter. She has also requested an intern/assistant/make-up artist to be available to the filming crew and equipped with the following: Translucent powder Hair brush Eye drops Lip balm Mac hydrating spray Small handheld mirror Bottles of water Mints and some sweets to suck on to clear croaky/dry throats.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>SPECIAL MEALS: Special Meals at Pilanesberg room clearly marked Halal and Vegetarian meals have been provided.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>STAGE AREAS: Eventstagram photos/tweeting Meet and Tweet Area – Twitter</td>
<td></td>
</tr>
</tbody>
</table>
Fountains
Pause for Applause – You tube videos, Instagram photos
Pause breaks/meals
Remember name tags throughout event
Casual Thursday branded T-shirt, Jeans and Trainers
GALA DINNER
Rehearsal at Royal Ballroom Wednesday
Dedicated Technician to Help
Speakers with Presentations at all Times
Event Outline
Copy of Program
Sponsor for the evening
Thank Yous
Gifts
Speaker/MC Welcome and House Keeping
Emergency Evacuations
Cellphones Switched Off
Toilets
Smoking Areas
Special Meals
Credit card facilities are available for beverages not included in the dinner.

FLOOR PLAN LAYOUTS
Insert all floor plans here:
Foyers
Main rooms
Registration Areas

HEALTH AND SAFETY
See Disaster Management File
Full Duration

FIRE EVACUATION:
In the event of fire
Dial 911 on the house phone
Evacuate the building when you hear the fire alarm
Do not use any of the Elevators
For assistance of any Elderly or Disabled Guest, call 911
Leave via the nearest exit from where you will be directed to the assembly point (Closest Pool Area)
Management does not accept liability for loss of Property

GENERAL EVACUATION
Evacuate the building using the nearest available exit.
Do not use elevator
Take personnel belongings (keys, purses, wallets, etc.

Health and Safety Briefing
Royal Ball room/ Pilanesberg room

1. Evacuation Drill
There will be NO evacuation drill conducted this week

2. Emergency
When you hear the siren and announcement will it be the “real deal”

"Attention Please! Attention Please!
This is an Emergency. Please evacuate your area immediately, proceed to the nearest assemble point,
Please walk, do not run.
Make use of the nearest escape route”

3. Evacuation Route
Please leave the building the same way you came in through the main conference entrance door
Please walk, don’t run
Ensure that you leave the area in an orderly manner
Then turn left to the Welcome Centre bus stop # 2 where you will be
Secure any hazardous materials or equipment before leaving.

Follow directions given by security officers or other evacuation marshals.

Report to your Emergency Assembly point.

Assist persons with disabilities or special needs.

Transported to your various hotels.

4. Roll Call
Before you leave the bus stop area, must you ensure that you partake in the roll call to assist emergency personnel by not looking for you whilst you are not in the danger area.

5. Fire Equipment
The fire equipment is situated at the back of the venue and next to each entrance door.

During Evacuation
Follow the instructions given by the security personnel and fire marshals.

Take as much personnel belongings as you can with you if any personnel belongings are left behind can you contact ext. 1186 to verify if your items were placed in our lost and found storage.

It is important that you DO NOT enter the area again once the alarm has been sounded and the area being evacuated.

7. Contact Numbers

Emergency
911

Security control
1111/5

8. Superbowl Point #3: Evacuation Route

Please leave the building the same way you came in through (this can be door 4/5) Please walk, don’t run.

Ensure that you leave the area in an orderly manner.

If the danger is anywhere near door 4/5 must you evacuate the building through door 6.

Turn left into the loading and right toward the Tennis Court Assembly point.

Point #6: Fire Equipment
The fire equipment is situated next to each entrance door of the premises.

INFRASTRUCTURE

Carpeting
Flooring
Fencing
Gas
Generators
Housekeeping/cleaning of venues
Replenishing rooms
Lighting
Parking
Power
Toilets
Waste
Water

MATERIALS MANAGEMENT

Awards
Prizes
Brochure distribution

Insert dimensions for areas.
<table>
<thead>
<tr>
<th>MERCHANDISE MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensing</td>
</tr>
<tr>
<td>Display</td>
</tr>
<tr>
<td>Distribution</td>
</tr>
<tr>
<td>Packaging (onsite/offsite)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PARAMEDICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 hours shifts</td>
</tr>
<tr>
<td>08:00 – 19:00</td>
</tr>
<tr>
<td>To be based in the following areas:</td>
</tr>
<tr>
<td>MONDAY: Superbowl</td>
</tr>
<tr>
<td>TUESDAY: Superbowl</td>
</tr>
<tr>
<td>WEDNESDAY: Superbowl</td>
</tr>
<tr>
<td>THURSDAY: Pilanesberg</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PHOTOGRAPHY AND VIDEOGRAPHY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concession trays and promoters</td>
</tr>
<tr>
<td>Promoters at the gate Tuesday and Wednesday</td>
</tr>
<tr>
<td>All decor for all events</td>
</tr>
<tr>
<td>Flash mob dancers</td>
</tr>
<tr>
<td>Caitlin/ all entertainment</td>
</tr>
<tr>
<td>Registration</td>
</tr>
<tr>
<td>Barmotion</td>
</tr>
<tr>
<td>Rehearsal Speakers Room</td>
</tr>
<tr>
<td>Meet and Tweet area</td>
</tr>
<tr>
<td>Pause for Applause</td>
</tr>
<tr>
<td>Food Trucks Wednesday and Thursday</td>
</tr>
<tr>
<td>Ursula during exhibition with a few guests</td>
</tr>
<tr>
<td>Gala dinner (as per brief)</td>
</tr>
<tr>
<td>Rassie Erasmus</td>
</tr>
<tr>
<td>Gavin Sharples</td>
</tr>
<tr>
<td>Vusi Thembekwayo</td>
</tr>
<tr>
<td>All speakers on stage at expo including sponsor speakers</td>
</tr>
<tr>
<td>Stage elements like LED podium/staging/ superbowl/stands</td>
</tr>
<tr>
<td>Promoters and their T-shirts</td>
</tr>
<tr>
<td>Gala dinner promoters and their Tuxedo T-shirts</td>
</tr>
<tr>
<td>Shebeen evening for suppliers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SECURITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>06:00 – 18:00</td>
</tr>
<tr>
<td>16 Shift Protection Officer 3 – 6 February Day shift</td>
</tr>
<tr>
<td>TUESDAY Dayshift Superbowl</td>
</tr>
<tr>
<td>Nightshift Superbowl</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUN CITY TO PROVIDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dayshift Superbowl Door 5,6,7 General patroller</td>
</tr>
<tr>
<td>MONDAY</td>
</tr>
<tr>
<td>Dayshift Superbowl</td>
</tr>
<tr>
<td>Nightshift Superbowl</td>
</tr>
<tr>
<td>Time</td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td>06:00 to 18:00 then 18:00 to 06:00</td>
</tr>
</tbody>
</table>

**WEDNESDAY**
- Dayshift Superbowl
- Nightshift Royal Ballroom

**THURSDAY**
- Dayshift Pilanesberg
- Nightshift Pilanesberg

**TWO WAY RADIOS**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full</td>
<td>All service suppliers taking two way comms must sign in and out daily. Disclaimer for lost or damaged radios. Radios to be collected from Event Organisers office from Monday.</td>
</tr>
</tbody>
</table>

**FREQUENCY/CHANNELS**

- **CHANNEL 1:** EVERYONE
- **CHANNEL 2:** US
- **CHANNEL 3:** SUN CITY

**Janna,** Laura, Jeanette, Rick, Jason, AV 1, ML = 8

**Sally (x1), 1 X Handheld Radio for Charlene:** Sun City to have a Two Way Radio so that crew can communicate with them.

**VEHICLE ACCESS**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full</td>
<td>If you have not sent us your vehicle access forms before the 16 January please send directly to sun city to Charlene and ensure that you are allowed access.</td>
</tr>
</tbody>
</table>

308
**Food and Beverages Matrix**

This matrix is used to keep track of what meals and beverages are going to be served throughout the event; who will be served; where will they be served; and what they will be served. It will also indicate who is responsible for the food and beverage items. This matrix is given to everyone working on the project including the venue. See an example below. The trick is to be as detailed and explicit as possible.

<table>
<thead>
<tr>
<th>DATE/DAY</th>
<th>DETAIL/DESCRIPTION</th>
<th>FOOD FOR:</th>
<th>LOGISTICS/OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DAY ONE EVENT</strong></td>
<td><strong>SET UP DAY</strong></td>
<td><strong>CREW LUNCH @ Star Suite 5</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PAX: 70 PAX @ R85.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Venue: Superbowl</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Serving Style: Chaffing dishes self service</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>FOOD AND BEVERAGES: BUDGET</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crew Lunch  70.00 74.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crew Soft beverages 70.00 43.90</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crew Dinner  70.00 87.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crew Soft beverages 70.00 43.90</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>CREW DINNERS @ SUPERBOWL</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Teas/Coffee stations/soft beverages - self service</td>
<td></td>
</tr>
<tr>
<td><strong>DAY TWO EVENT</strong></td>
<td><strong>DAY 1 OF ARRIVAL OF GUESTS</strong></td>
<td><strong>BREAKFAST</strong></td>
<td>Day before guests – Breakfast at Hotel Palm Terrace Restaurant</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>BEVERAGES</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>CREW and EXHIBITORS LUNCH</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PAX: @ R85.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Venue: Pilanesberg Omega B</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Serving Style: Self service</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>180 X Crew</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>150 X Exhibitors</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>FOOD AND BEVERAGES BUDGET</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crew Midmorning Teas/Coffees  X 3 (Morning, Lunch and Afternoon)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>187 x 86.84</td>
<td></td>
</tr>
<tr>
<td>DATE/TIME</td>
<td>DETAIL/DESCRIPTION</td>
<td>TIME</td>
<td>FOOD FOR:</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------------</td>
<td>------</td>
<td>------------</td>
</tr>
</tbody>
</table>
| DAY TWO EVENING EVENT | SHEEBEN COCKTAIL EVENT | 18:00 | Total: 17 107.48 EX VAT
Exhibitors Midmorning Teas/Coffees X 3 (Morning, Lunch and Afternoon)
150 X 86.84
Total: 13 026.00
Crew Lunch 197 X 75.00 Total: 14 775.00
Crew Soft beverages 197 X 44.00
Total: 8 868.00 |

<table>
<thead>
<tr>
<th>LOGISTICS/OPERATIONS</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>MENU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penne Pasta Arrabiata</td>
</tr>
<tr>
<td>Fettucini Alfredo</td>
</tr>
<tr>
<td>Spaghetti Bolognaise</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INCLUDED ITEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soft Beverages:</td>
</tr>
<tr>
<td>Cordials 5.00</td>
</tr>
<tr>
<td>Fresh Orange Juice 16.00</td>
</tr>
<tr>
<td>Soft beverages - bottles 300ml 16.00</td>
</tr>
<tr>
<td>Soft beverages - airline 200ml 17.00</td>
</tr>
<tr>
<td>Soft beverages - cans 330ml 19.00</td>
</tr>
<tr>
<td>Appleitzer/Tomato cocktail 25.00</td>
</tr>
<tr>
<td>Tomato cocktail 25.00</td>
</tr>
<tr>
<td>Sunint Mineral Water 500ml 14.00</td>
</tr>
<tr>
<td>Soft beverages 1LT 31.00</td>
</tr>
<tr>
<td>Red Bull - standard item on promotion 29.00</td>
</tr>
<tr>
<td>Beers:</td>
</tr>
<tr>
<td>Castle and Lite: Black Label; Hansa 340ml 20.00</td>
</tr>
<tr>
<td>Amstel 340ml 20.00</td>
</tr>
<tr>
<td>Amstel QUARTS 660ml 29.00</td>
</tr>
<tr>
<td>Windhoek Lager/Light 340ml 20.00</td>
</tr>
<tr>
<td>Windhoek Lager / Draught QUARTS 660ml 29.00</td>
</tr>
<tr>
<td>Semi-sweet and Rose:</td>
</tr>
<tr>
<td>Nederburg Stein</td>
</tr>
<tr>
<td>Nederburg Rose</td>
</tr>
<tr>
<td>Shebeen Housewines:</td>
</tr>
<tr>
<td>Villiera ‘Down to Earth’ White (Sauv. Blanc/Semillon)</td>
</tr>
</tbody>
</table>

Prices from 1 Feb 2013

BUDGET:
Beverage Estimate - All guests and crew 294.00 120.00 35 280.00

WATER Please provide jugs of water with ice for guests

SIGN OFF
Janna Gers, Laura Dunbar or Client
NOTIFICATION Notify Janna or Laura at R5000 increments

EXCLUDED ITEMS
Everything else not in this list is cash bar
<table>
<thead>
<tr>
<th>DATE/DAY</th>
<th>DETAIL/DESCRIPTION</th>
<th>TIME</th>
<th>FOOD FOR:</th>
<th>LOGISTICS/OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>PAX: 311</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>MEN</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Braai menu 1 – R290.00p.p</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Braai Menu 1 - All guests and Selected Crew + Entertainers 294 X 254.38</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total: 74 787.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Welcome Drink (Toffee Mampoer) 294 X 9.65</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total: 2 837.10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Beverage Estimate - All guests and Crew 294 X 120.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total: 35 280.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Waiter staff to wear Branded Revolution Aprons X 30</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Bar limit and drink selection</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Signage of limit on beverages</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Special meal requirements</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Braai menu 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Starters:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Mixed Green leaf Salad</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Potato Salad</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Beetroot Salad</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Coleslaw</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Spicy Bean Salad</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Freshly Baked Homemade Bread / Rolls</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Main Course</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>From the Grill:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Boerewors</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Chicken Drumsticks/wings/thighs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Lamb Chops</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>From the Pots:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Beef stew</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Mealie Pap, Rice and Sheba</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Vegetables:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Green Bean Stew</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sweet Potato</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Braised Cabbage</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Spinach</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Corn on the Cob</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Desserts:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Fresh Fruit Platter</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Koeksisters</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Milk Tart</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>VEGETARIAN PATTIES</strong></td>
</tr>
</tbody>
</table>

**ACCOMMODATION MATRIX**
<table>
<thead>
<tr>
<th>DAY 1</th>
<th>STAKEHOLDER</th>
<th>SHARING</th>
<th>SINGLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>EVENT ORGANISERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>CUSTOMERS + SUPPLIERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>CREW + ENTERTAINERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>SPEAKERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>FINAL TOTAL</td>
<td>SHARING</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>SINGLE</td>
<td>15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DAY 2</th>
<th>STAKEHOLDER</th>
<th>SHARING</th>
<th>SINGLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>EVENT ORGANISERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>CUSTOMER + SUPPLIERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>CREW:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>SPEAKERS:</td>
<td>A</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>FINAL TOTAL</td>
<td>SHARING</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>SINGLE</td>
<td>15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

AV CUE SHEET: EXAMPLE
AV Cue Sheet

Insert all information pertaining to the flow of the event with regards to audio, visual, lighting and staging. This is used to inform the AV, production company of what they are to do, when it must be done, and the detail around it. See an example below for a half day show with five presenters and a panel.

<table>
<thead>
<tr>
<th>TIME</th>
<th>ACTIVITY</th>
<th>SOUND</th>
<th>VISUAL</th>
<th>LIGHTS</th>
<th>CUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>07:00</td>
<td>AV Load In</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00 – 11:00</td>
<td>AV Rehearsals, Sound Checks, Lighting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00</td>
<td>Speaker Rehearsals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00</td>
<td>Registration and Luncheon ( Rooftop Terrace)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00</td>
<td>Final Sound Checks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13:00</td>
<td>Doors Open</td>
<td>Song 1, Song 2</td>
<td>City Scene</td>
<td>Full Power</td>
<td>Setting 3</td>
</tr>
<tr>
<td>13:13</td>
<td>Dim lights, advance to opening sequence song</td>
<td>Song 3</td>
<td>City Scene</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13:25 – 13:30</td>
<td>WM – Host</td>
<td>WM Title Slide</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13:30 – 13:45</td>
<td>MC</td>
<td>MC Title Slide</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13:30 – 14:15</td>
<td>State of the Industry</td>
<td>Wireless LAV 1</td>
<td>RS Title Slide</td>
<td>Setting 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rory Sutherland, Exec Creative Director</td>
<td></td>
<td>Ogilvy Presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>APPLAUSE</td>
<td></td>
<td>RS Title Slide</td>
<td>Setting 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>RS to Intro Team One</td>
<td></td>
<td>Event Logo Slide</td>
<td>Setting 1</td>
<td></td>
</tr>
<tr>
<td>14:30 – 14:45</td>
<td>Team One Case Study</td>
<td>Wireless LAV 2</td>
<td>Team One Title</td>
<td>Setting 2</td>
<td>2 Videos in PPT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Laptop 1</td>
<td>Team One PPT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Laptop 1</td>
<td>Event Logo Slide</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FLIGHT AND TRANSPORT SCHEDULE

<table>
<thead>
<tr>
<th>FLIGHT</th>
<th>FLIGHT 1</th>
<th>FLIGHT 2</th>
<th>FLIGHT 3</th>
<th>FLIGHT 4</th>
<th>FLIGHT 5</th>
</tr>
</thead>
</table>

313
NAME, Surname (As appears on ID)

FLIGHT DETAILS
- Departure Date:
- Departure Time:
- Departing From:
- Flight Number:
- Arrival Date:
- Arrival At:
- Arrival Time:
- Return Flight Date
- Return Flight Departure From:
- Return Flight Time:
- Type of Ticket/Seat:
- Taxes:
- Luggage Restrictions:

MEET and GREET SERVICE
- Meet and Greet Signage

COST

TRANSPORT/TRANSFERS
- Collection Date & Time:
- Collection From:
- Drop Off Date:
- Drop Off Time:
- Drop Off Location:
- Return Collection Date & Time:
- Return Collection Location:
- Meet and Greet Service:

Type of Transport Required
- Hotel/Group Shuttle
- Bus
- Coach
- Rental Car
- Self-Drive
Step Eight

Event Execution Phase
COVERED IN THIS SECTION:

THE FINISH LINE
SET UP
HOW TO MANAGE REGISTRATION, GIFTING AND PROGRAM FLOW
MANAGING STAKEHOLDERS
DURING THE EVENT
BREAKDOWN/STRIKE
CHAPTER 10: STEP 8 EVENT EXECUTION

THE FINISH LINE

All the planning you've done ahead of time is behind you.

The Event Executive Summary (EES) is to be utilised throughout the execution phase of the event.

What to look out for on the day of your event:

- **Be Prepared for Last Minute Changes:** Things that usually come up on the fly are last-minute schedule changes, last-minute staff assignments - sometimes food's not quite ready, so you have to stall a little bit.

- **Hire the Right Number of Staff:** When we have our hands full, we have a good amount of people helping out. When you're short-handed, you've got to make the most of everybody - a lot of people wear many, many hats.

- **Ensure Guest Safety:** A lot of times you have to watch out for the safety of your guests. You don't want anyone driving or leaving your event in an intoxicated state that could really bring harm to themselves or others, so try to keep an eye on all our guests and if anyone seems not okay, make sure that they have a safe ride home.

- **Have Gift Bags Prepared.**
- **Keeping the Schedule and Program on Track.**

<table>
<thead>
<tr>
<th>Performance Criteria</th>
<th>You Must Be Able To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>Keep to the agreed plans for setup and breakdown, or adapt plans to changing circumstances, where necessary.</td>
</tr>
<tr>
<td>P2</td>
<td>Ensure personnel receive the information, instruction, training and supervision they need to carry out their function.</td>
</tr>
<tr>
<td>P3</td>
<td>Ensure all resources used during setup and breakdown are checked, and respond correctly to any problems.</td>
</tr>
<tr>
<td>P4</td>
<td>Communicate clearly with all those involved in line with agreed communications Protocols.</td>
</tr>
<tr>
<td>P5</td>
<td>Present a positive image of yourself and your organisation to internal and external customers and provide them with optimum levels of customer service.</td>
</tr>
<tr>
<td>P6</td>
<td>Seek advice and guidance from appropriate people, when necessary.</td>
</tr>
<tr>
<td>P7</td>
<td>Maintain the health, safety and welfare of personnel and resources.</td>
</tr>
<tr>
<td>P8</td>
<td>Debrief personnel and identify relevant points for event evaluation.</td>
</tr>
<tr>
<td>P9</td>
<td>Complete all relevant documents and records and deal with these according to your organisation’s procedures.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Knowledge And Understanding</th>
<th>You Need To Know And Understand:</th>
</tr>
</thead>
<tbody>
<tr>
<td>K1</td>
<td>The importance of managing setup and breakdown effectively.</td>
</tr>
<tr>
<td>K2</td>
<td>The main stages involved in setup and breakdown.</td>
</tr>
<tr>
<td>K3</td>
<td>The roles of people you will be working with during setup and breakdown.</td>
</tr>
<tr>
<td>K4</td>
<td>The importance of having clear plans for setup and breakdown and following these plans as agreed.</td>
</tr>
<tr>
<td>K5</td>
<td>The typical problems that may occur during setup and breakdown and how you could respond to these.</td>
</tr>
<tr>
<td>K6</td>
<td>The importance of presenting a positive image of yourself and your organisation and how to do so.</td>
</tr>
<tr>
<td></td>
<td>How to provide optimum levels of customer service during setup and breakdown.</td>
</tr>
<tr>
<td>K7</td>
<td>and who your customers are. The main contractual obligations relevant to setup and breakdown.</td>
</tr>
<tr>
<td>K8</td>
<td>The main health and safety requirements relevant to setup and breakdown.</td>
</tr>
<tr>
<td>K9</td>
<td>Who you would need to communicate with during setup and breakdown.</td>
</tr>
<tr>
<td>K10</td>
<td>The information you need to access about event plans and resources.</td>
</tr>
<tr>
<td>K11</td>
<td>The importance of briefing and debriefing personnel and how to do this effectively.</td>
</tr>
<tr>
<td>K12</td>
<td>The main requirements for safety and security during setup and breakdown and why these are important.</td>
</tr>
<tr>
<td>K13</td>
<td>The importance of checking resources during setup and breakdown and how to ensure this happens.</td>
</tr>
<tr>
<td>K14</td>
<td>Industry/Sector Specific Knowledge And Understanding:</td>
</tr>
<tr>
<td></td>
<td>The main types of events that occur in the sector.</td>
</tr>
<tr>
<td></td>
<td>The specific processes involved in setup and breakdown for these events.</td>
</tr>
<tr>
<td></td>
<td>The main relevant legal and regulatory requirements that apply to events in the sector and their implications for setup and breakdown.</td>
</tr>
<tr>
<td></td>
<td>The extent of your own responsibilities for setup and breakdown.</td>
</tr>
<tr>
<td></td>
<td>How your role relates to the roles of others in your organisation.</td>
</tr>
<tr>
<td></td>
<td>The main responsibilities of colleagues with whom you work when carrying out setup and breakdown and other organisations with whom you can liaise.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Behaviours</th>
<th>Additional Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. You present information clearly, concisely, accurately and in ways that promote understanding.</td>
<td></td>
</tr>
<tr>
<td>2. You address multiple demands without losing focus or energy.</td>
<td></td>
</tr>
<tr>
<td>3. You recognise changes in circumstances promptly and adjust plans and activities accordingly.</td>
<td></td>
</tr>
<tr>
<td>4. You respond quickly to crises and problems with a proposed course of action.</td>
<td></td>
</tr>
<tr>
<td>5. You find practical ways to overcome barriers.</td>
<td></td>
</tr>
<tr>
<td>6. You keep people informed of plans and developments.</td>
<td></td>
</tr>
<tr>
<td>7. You give feedback to others to help them improve their performance.</td>
<td></td>
</tr>
<tr>
<td>8. You take personal responsibility for making things happen.</td>
<td></td>
</tr>
<tr>
<td>9. You create a sense of common purpose.</td>
<td></td>
</tr>
<tr>
<td>10. You take timely decisions that are realistic for the situation.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Skills</th>
<th>Skills Listed Below Are The Main Generic `Skills' Which Need To Be Applied:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Organisation.</td>
<td></td>
</tr>
<tr>
<td>2. Communication.</td>
<td></td>
</tr>
<tr>
<td>3. Problem solving.</td>
<td></td>
</tr>
<tr>
<td>4. Leadership.</td>
<td></td>
</tr>
<tr>
<td>5. Relationship management.</td>
<td></td>
</tr>
<tr>
<td>6. Customer service.</td>
<td></td>
</tr>
<tr>
<td>8. Conflict resolution.</td>
<td></td>
</tr>
<tr>
<td>9. Managing resources.</td>
<td></td>
</tr>
<tr>
<td>10. Recording and reporting.</td>
<td></td>
</tr>
</tbody>
</table>
The Event Execution Is Comprised Of:

→ **The Administration Execution Domain** deals primarily with ensuring that the proper allocation, direction, and control of the resources that were planned for in previous steps, are actually used in an event project on the day. It is the event organiser's responsibility to ensure that all areas of administration are executed throughout set up, during the event and breakdown. The event organiser will make use of event management tools throughout the event. These tools ensure that all planned actions and activities are implemented. One such tool is The Event Executive Summary (EES).

After putting considerable effort into developing and planning an event, you will need to orchestrate the plan of action. The meeting/event organiser is the focal point of intelligence, determining how, where, and when all things must come together. Regardless of the teamwork developed in planning the event, if information is not communicated in an effective and timely way to the on – site support team, the hard work of planning the event could be lost in transition.

The Event Executive Summary (EES) is a comprehensive document/guide that outlines the complete requirements and instructions for the event. It is authored by the event organiser and shared with all appropriate vendors as a vehicle to communicate the expectations or services for the project.

The creation of the EES should not be done last minute; rather, it should be created as part of the overall planning process for the management of a meeting or event.

→ **The Design Execution Domain** focuses on ensuring that the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions are executed and carried out at the event. The role of the event organiser is to oversee the setup and breakdown of all design elements.

→ **The Marketing Execution Domain** addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. The nature of the event as an “experience” necessitates a thorough understanding of the unique buyer-seller relationship associated with this intangible product. During the event the event organiser will ensure that all marketing components are implemented.

→ **The Operations Execution Domain** concentrates on the people, products, equipment, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and manoeuvres associated with each. Impeccable coordination is required in order to manage this symphony (or cacophony) of logistical and functional requirements and expectations. It is the event organiser’s responsibility to manage the execution of all planned operations. The EES guide will be used to ensure that all activities are set up and broken down on time, within budget and completed by the necessary supplier.
The Risk Execution Domain deals with ensuring that the protective obligations, opportunities, and legalities are managed throughout the event. It is the event organiser’s responsibility to ensure that risk, health and safety and security are coordinated, controlled and managed throughout the event from set up to breakdown.

All execution domains include:

- **Set Up Management.**
- **During Event Management.**
- **Breakdown/Strike Management.**

### SET UP

Be the first to arrive at the site to oversee the preparations. Make sure everyone files in accordingly and start making phone calls if not. Assist those who need assisting, direct those who need directed, and get out of the way when you need to. No injuries until after the event, please.

You'll feel a little calmer if you make a checklist. Have a portion for your crew, a portion for hired out crews, a portion for decorations and basic set-up, and a portion for equipment. When all is checked off, that's when you have time to breathe.

### SET UP MANAGEMENT

You will need to ensure that everyone working on the project has a copy of the program for the day and that they know what time the “show” begins. You will need to take care of the following items before you open the doors:

| Administration | ➤ Ensure that relevant stakeholders are where they need to be at the time they need to be there.  
➤ Ensure stakeholders know what they roles and responsibilities are. They should have a copy of the Event Executive Summary which contains instructions and information on the entire event.  
➤ Ensure project set up is on schedule. Check on milestones and ensure project is running according to schedule.  
➤ Ensure activities are progressing and on course.  
➤ Ensure staff, volunteers and anyone involved in assisting on the project is on site and aware of roles and responsibilities.  
➤ Ensure all relevant personnel have collected accreditation name badges and two – way communication radios.  
➤ If required – have a pre – event briefing session with all necessary stakeholders focusing on the schedule and deadline times.  
➤ Ensure communication equipment is ready. |
| Design | ➤ Ensure all design areas have been set up.  
➤ Collect fire retardant certificate (if applicable). |
| Marketing | ➤ Ensure marketing material is unpacked and ready for display.  
➤ Get prizes, certificates ready.  
➤ Get merchandise ready. |
| Operations | **Attendee Management**  
Ensure the following has been set up:  
➤ Access and admissions controls in place.  
➤ Crowd management systems in place.  
➤ Are waiters dressed and ready for service?  
➤ Are parking attendants ready and do they know what is expected of them and how to handle enquiries?  
➤ Is there security control?  
➤ Do people need vouchers and cards?  
➤ Is signage for parking areas clear? |
Is there someone to meet and greet people?

Parking vouchers: If you are issuing parking vouchers, only hand these out when attendees leave as they may lose them if you give them to you first thing in the morning. Have them ready on a table for easy collection or hand them out when feedback forms are collected.

Gifting

Gifting packed and displayed.

Food And Beverages

Have you reconfirmed times and menus for all food – related events?

Have any changes been submitted to the banquet event orders? If so, have you double – checked that the changes were incorporated?

Are food items labeled?

Have tables been set with crockery, cutlery and glassware?

Infrastructure And Logistics

Ensure transport has collected guests.

Flights have arrived on time.

Suppliers have loaded in.

Carpeting has been installed or removed (depending on your requirements).

Electricity, electrical points ready for use.

Generators ready.

Cleaners have cleaned areas.

Toilets have been cleaned and replenished.

Restroom attendants are ready to receive guests.

Technical, production set up has been completed

Sound check, light check and dry run completed.

Ensure doors are closed before guests arrive.

Registration

Check to see if registration tables, areas are set up.

Stanchions and queuing systems in place.

Accreditation printers set up.

Name tags, lanyards etc. displayed and ready for invitees.

Registration furniture, electrical power points set up.

Speakers and Entertainment

Has the time the speakers are to arrive and speak been reconfirmed with them?

Do you have all the speakers’ cellphone numbers in case of emergency?

Has all AV equipment been confirmed?

Have you confirmed the sound check time?

Have speakers arrived?

Have they had a sound check?

Do you have a final copy of their presentation?

Ensure there is water on stage for them.

Venue Room/Meeting Room

Is there sufficient seating, and is it properly arranged?

Are place cards in place, if needed?

Are water bottles, note pads, and other amenities ready?

Do you have added seating in case of later arrivals?

Has the AV equipment been sound tested?

Way Finding

Is signage clear marked and visible?

Are banners correctly placed?

Flow of guests and direction?

Risk

Ensure all set up areas are safe and secure.

Ensure design elements are safe, correctly placed/suspended and that you have collected all necessary compliance documentation.

Ensure security is in place and they have been briefed.

Ensure medics are in place and triage/first aid areas are set up.

Get final venue approval once entire event has been set up.

Ensure you have collected the electrical compliance certificate, stability reports, and structural indemnities before you open your doors.

Event Execution/During Event

Administration

Monitor the program schedule and ensure everything is running on time.

Have ushers/stewards in place to help seat guests.
Ensure kitchen is informed constantly of timings of the program.
Notify entertainers of timings of the program.

**Risk**
- Respond to hazards or risks if they occur (put in action your disaster management plan).

---

**Table 10: ADMOR Set up on Day of Event**

<table>
<thead>
<tr>
<th>HOW TO MANAGE REGISTRATION, GIFTING AND PROGRAM FLOW</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REGISTRATION</strong></td>
</tr>
</tbody>
</table>

Often the registration table is the first impression a participant has of the entire event experience to follow. Make it count. If problems arise with registrations – let attendees know you are working diligently to check on and fix the problem. Allow them to go have coffee or tea whilst you sort the problem out. Be attentive. Make sure that your staff knows what the registration procedures are and that they are ready to handle any troubleshooting.

Staff and attendees will take their cues from you. If you are running around wide – eyed and frantic, those around you will suspect the event is in trouble or that something is wrong. Try and do as much as you can before you get to the event to limit the time expenditure on the day of the event. Preparation is key. This will help you portray an image of confidence to everyone around you.

Do your best to be as proactive as possible before the event begins, then be promptly reactive once your event starts. Make decisions and stick to them. Don’t change the scope too often as staff will get confused.

- Are registers on clipboards with pens?
- Are gift bags ready?
- Are name tags and lanyards in place?
- Have registration tables been set up?
- Has adequate staffing been arranged for registration?
- Have you alphabetised registration – put up signs to indicate whether it is according to surname or company name?

**Layout of Register:**
The register should be easy to read and attendees should be able to spot their name easily. If you need them to sign make sure that you have a pen ready (that works) and allow enough space on the register for signatures. Always include an extra page for late registrations. This will allow them to add their names and contact details.

**Receiving Attendees:**
Even before you and your staff start greeting participants at the event, make sure they feel welcome by setting an inviting tone and enthusiastic attitude. Remember to be hospitable! You can build up much goodwill from the initial impressions attendees have.
**Verbal and Non-Verbal Communication:**
During your pre – event briefing, outline what dialogue should be used at the registration table. Indicate how people are to be addressed. For example, do they greet attendees in a formal way using Mr. and Mrs. or do they use the person’s first name. Also ensure that they are attentive and that their body language is not read as being closed off and rude.

**Turnaround Times:**
The registration should be a quick process that allows people to approach the table, get the information/packs/amenities they require and move on. If you realize that a line is forming – get ‘floating’ staff to walk down the line with a clipboard and register and tick them off so that they can move in to the venue. Make sure the tables are staffed with knowledgeable personnel and that the tables themselves have been designed to allow flow. Tables must be organised under appropriate headings so that registration will flow smoothly. For instance, one table could be for attendees A – H, another I – N, another O – Z, another for VIPS and guests, and one more for press.

**Staff Dress Codes:**
Be specific about the dress code that you require at the event. Include this in your policies and procedures training document so that there is no confusion.

**Payments at the Event:**
If this event requires a payment from the delegate or attendee do not handle this at the main registration table. Allocate a separate payment area so as not to embarrass anyone who has not paid.

**GIFT MANAGEMENT**
Whether it is an elaborate favour or entire gift bag – make sure that you do not leave the gifts on guests chairs. Typically gift bags are placed on each guest/attendees seat. But what may happen is that if people are running late and seats are open, other guests may take their gifts. Make the gift of giving an experience.

You can either give them the gifts as they arrive at the door or when they leave. This way you can ensure that each person receives one. Alternatively you can have guests sign for their gifts depending on the gifts value. If the event has a substantial attendance and the gift bags are coveted, plan to hand out a ticket or stub to each arriving guest that can be redeemed at the end of the event as they depart.

**PROGRAM FLOW AND TIME KEEPING**
Stick to your itinerary. Pay close attention to start and end times. Float among the happenings to check on attendance at the event. Since you cannot be everywhere at once, assign similar responsibilities to designates and have them report back to you.
While you monitor the itinerary, keep constant check on what’s ahead, noting everything from what time speakers are arriving to what times breaks are set for. Your best bet for keeping your event from stopping dead in its tracks is fending off the culprits that will cause program pieces to stall, such as late arrivals, no – shows, non-working equipment, and ill – prepared meeting spaces.

Act quickly if you see something happening. To ensure the smooth flow of events make sure that everyone has read your policies and procedures document as described in the event administration time management section.

When problems occur don’t highlight the problem. The audience generally does not know what should or should not be happening. For example, if you are running a conference and the speaker’s lapel microphone stops working don’t stop the presentation and say “we are sorry for the break in the program but….” Simply have a contingency plan ready. This would include having a podium on the stage at all times which has a microphone attached to it. You would have already briefed your speaker beforehand so that they know what to do should issues arise.

Another example would be – if the quality of the sound equipment is crackly, don’t stop the conference and say “we apologise for the poor sound quality”, this only highlights the point. Wait until you have a pause break or until the first speaker has finished before you address the problem, but do not stop the proceedings unless you absolutely have to. Make sure during your sound test or dry run that you brief speakers and MCS/Program Directors and anyone responsible for presentations. Tell them what you expect should problems occur.

Include a run through on the following points:
- What to do if there is poor sound or issues with lapels?
- What to do if there is a problem with the PowerPoint presentation or video clips?
- What to do if there are electrical failures like black outs?
- Indicate to them where you will be during the presentation in case of problems?

MANAGING STAKEHOLDERS

THE CLIENT

- Keep The Client in the loop throughout the event but only give them snippets of key information so as not to overwhelm them.
- If you have an events office set up on site make allowance for The Client to be based in this area so that you have access to them should you need them.
- Ensure that The Client knows to only communicate to the project manager/event organiser and not to the vendors or suppliers as this will result in broken telephone.
- Ensure they are aware of their roles and responsibilities and ensure there is a clear chain of command.
- It must be communicated by The Client to their staff that - no staff members are to give instructions to the event organiser/team. Having too many people involved results in risk for the project.
• It must be decided at the beginning of the project who will have the final say on all matters onsite at the event. That way there is a clear line of decision making in place.

COMPANY

Do your thing. Trust and respect your service team to look after themselves -- if you’ve given them a good base, they should be fine. Offer assistance if needed, but they should be experienced enough not to need any help at all.

Keep in mind - the management role will be more active problem solving and ensuring all the back of house work such as food preparation and service runs to plan.

Your team should have a game plan and know what is expected of them. The Event Executive Summary will have all necessary event information in it so staff can use this as a reference.

CUSTOMERS

• Keep an eye on the guests and keep contact with the MC often and discreetly in case they want (or need) to change plans.
• Ensure you have an information desk or a person allocated to assisting with customer/invitee issues such as names not on the list etc.

VENDOR AND VENUE STAFF

You can help your cause by treating the hotel or site staff and vendors with consideration and respect. Most of them will strive to help you, but you’ll find that they will take even greater care if you reciprocate their efforts with kindness.

Here are some tips on how to get the best from your venue and vendors:

• Before you arrive at the event send through all your running scripts and documents including a floor plan which will indicate where everything needs to go. This will help everyone prepare beforehand.
• Before you arrive also find out who your point of contact will be. You don’t want to be stepping on anyone else’s toes. Always deal with the Banquet or Catering Manager at the venue as they will disseminate your message to their staff. You should not be the one instructing the floor staff. This is the job of the site manager. Ask them who you need to speak to when coordinating:
  o Food and beverages.
  o Table seating and chair arrangements.
  o Equipment (if not outsourced).
  o Lighting (if not outsourced).
  ▪ If you are running a banquet or gala evening - get a list of all the head waiters. Find out who will be allocated to which table. Take a flip chart and draw each table and where it will be.

326
- Take each person responsible for that specific table – to the table. You can then brief them on where your special guests are sitting or whether there are people with special meal or drink requirements. This helps you build a relationship with the waiter so that you are on a first name basis. If you need something done you will then know who is responsible.
- Everyone likes to be addressed by their name. Try not to address people by saying “Hey you”. You will get better results from people if they see that you respect them.
- Remember to give your vendors something to eat and drink before the event/ or during set up.

**SPEAKERS**

- Have a dedicated person allocated to assist and manage speakers and their requirements.
- Ensure you have a holding room for them where they can sit and prepare for their presentations.
- Ensure speakers are called 2 – 3 hours prior to them arriving to ensure they are running on time.
- Allow time for rehearsals and sound checks.
- Brief them on time allocation and time management protocols as well as how to manage audience questions and answers.

**DURING THE EVENT**

The event begins when everything is set up, the doors are open and you are expecting your first guests to arrive.

There will be a number of issues/challenges that can arise during the event. Here are some strategies on how to manage them.

**MANAGING LATE GUESTS AND OTHER GUEST PROBLEMS**

This one is a common issue, so it is best to be prepared. By and large, delays are understandably hard to avoid (such as unforeseen traffic issues) and are forgiven by guests who came on time. That being said, here are a few things you can do to do your best to keep it from happening:

- Ensure that invitations are clear as to the time of the event and if requesting an RSVP, ensure that the time is confirmed. Communicate with (via your contact sheet) the MC, relevant guests, entertainers and kitchen staff as soon as you’re aware of an issue you cannot resolve easily. Should the delayed guests be the focus for example the MC or CEO, the usual methods are:
  - Contact the delayed guest/s directly to check for an estimation. Advise the kitchen immediately of all developments so they can slow down or speed up to keep time.
Refrain from making it known publicly that the event is being delayed because of certain guests (but advise key hosts or members of the party that you have been made aware of the fact. Let them know what you intend to do, but allow the hosts to make a suggestion as they know the members of their party and what would be appropriate in the context.

Maintain careful watch on the time in relation to speeches. If key guests are late, serve an additional appetizer (first course) and/or beverage early as this will prevent guests who came on time from becoming bored and will keep them occupied.

- For guests that are going to be delayed for more than is reasonable or possible (such as when serving food that simply cannot wait), start the event as planned and when the delayed guests arrive, start them at the next course of a meal (even if this is dessert).

- For guests deliberately arriving late, it should be seen as that guest's choice, not your fault as manager, so your duty is first to the guests that are already present and to ensure they're looked after. In a nutshell, act as if there is no problem and carry on regardless.

MANAGING FOOD ISSUES

This one is rare if you have planned things carefully; however accidents do happen (such as a guest making a mess of a food table, or an accident in the kitchen). Early on you should be aware of the type of guests so you can take into account when and where food is displayed (such as for a buffet) and where such guests are seated.

- Any spillage for safety reasons must be cleaned up immediately, even if it means removing a red carpet or desired decor and furniture to be able to do so.

- A soft rope barrier, curtain or screen is recommended whenever you need to hide the food area (such as a buffet with chafing dishes, or when organising a "reveal" of the next course), as certain guests may feel that if food is in the dining area, it is free-for-all, when they want -- which is not always the case.

- Shuffle the menu. If part of a dish is not possible to include (such as a side dish that was burnt), either exclude it altogether, find an alternative, reduce the portion sizes to stretch foods, but increase portions of other foods to balance. Advise table hosts as required.

- Unexpected vegetarians, those with food allergies, religious or special diets — no surprise should ever occur with proper planning — but guests occasionally do bring along additional family members, partners or close friends without advising you, especially if it's not a strict invitation-only event. This is usually easily resolved. Keep a headcount as guests arrive and when they arrive at the door, ask if there are any food requirements and advise the kitchen and service staff immediately.
Event Execution/During Event

**Administration**
- Monitor the program schedule and ensure everything is running on time.
- Have ushers/stewards in place to help seat guests.
- Ensure kitchen is informed constantly of timings of the program.
- Notify entertainers of timings of the program.

**Risk**
- Respond to hazards or risks if they occur (put in action your disaster management plan).

**BREAKDOWN/STRIKE**

**Clean up and get out!** Just like mom said, "Leave it in the same condition you found it in," the same goes for your venue. Everything needs to be just like it was before you got there -- this is one business where you don't want to burn any bridges. So let your crews know it's time to tear down and don't let them leave until all is taken care of. And you need to pitch in too!

This is nice, sure, but it also prevents you from being billed any more than you should be. Many places will tack on extra cleaning fees if they find any opportunity to do so. So make it as spic and span as possible to avoid the hidden costs.

**Breakdown/Strike Management**

*By the time you come to consider implementing this part of the event arrangements, you will probably be elated, tired and full of new ideas for the next event. But it is important that you put as much effort and care into the final phases of the event as you have put into the planning and delivery.*

**Administration**

**You Will Need To Consider The Following:**
- **Timing:** How long will the clear up and strike take? Factor this into the planning and budgeting as some venues may charge you for a full day strike.
- **Breakdown** all areas that have been set up including design, marketing and operational areas.
- **Rubbish:** Removal of rubbish needs to be considered. You will need to consider who will be responsible for clearing rubbish away. You can check to see if they provide you with skips.
- **Removal:** Of all equipment, stock or anything that was delivered to the venue. Keep a book and document what has been removed and by who and have them to sign this as proof.
- **Final inspection:** Inspect the venue to ensure that nothing has been damaged and that everything has been cleared collected and is accounted for.
Step Nine

Closure Phase
COVERED IN THIS SECTION

OVERVIEW OF PROJECT CLOSEOUT PHASE
ADMINISTRATIVE CLOSURE
EVALUATION CLOSURE
  Why Evaluate?
  The Benefits of Evaluation
  Stages of Evaluation
  Performance
  Methods of Performance Evaluation
  Self-Evaluation
  Management - By - Objectives
  Evaluating Customer Satisfaction Levels
  Benefits of Evaluating Customer Satisfaction
  Traditional Model
  Profitability 80/20 Rule
  Defining Customer Satisfaction
  Measuring Customer Satisfaction
  Transforming Customer Satisfaction Data into Business Value
  Reporting Results

LESSONS LEARNT
KNOWLEDGE TRANSFER
CLOSE OUT AND SIGN OFF
SUMMARY
The Project Closeout Phase is the last phase in the project lifecycle. Closeout begins when the user accepts the project deliverables and the project oversight authority concludes that the project has met the goals established. The major focus of project closeout is administrative closure and logistics.

Project Closeout takes place post event. The Closing Process Group consists of those processes performed to conclude all activities across all Project Management Process Groups to formally complete the project, phase, or contractual obligations.

The Post Event Closure Phase Is Made Up Of The Following Components:

- Administrative Closure component.
- Evaluation: Evaluation, feedback and reporting component.
- Close Out component.

Project Closeout Includes The Following Key Elements:

- Costing of project deliverables to operations.
- Redistributing resources—staff, facilities, equipment, and automated systems.
- Closing out financial accounts.
- Completing, collecting, and archiving project records.
- Documenting the successes of the project.
- Documenting lessons learned.
- Planning for Post Implementation Review.

ADMINISTRATIVE CLOSURE

Administrative Closure: Ensure that all areas of the event have been concluded and that all items hired or rented have been returned, final budgets reconciled etc. Administrative closure involves the preparation of administrative documentation, collection of project documentation, disposition of project documents, and logistics activities that ensure that the project resources are redistributed. Administrative closure includes, but is not limited to, task such as archiving, financial account closure, facilities closure, contract closure, and personnel reassignment.

Examples of Administrative Closure:

<table>
<thead>
<tr>
<th>General Items:</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Ensuring that any equipment that went to the event is returned.</td>
</tr>
<tr>
<td>o Collection of two way radios by supplier (if hired).</td>
</tr>
<tr>
<td>o Videographer to deliver photos, videos and footage of the event.</td>
</tr>
</tbody>
</table>
- **Cost Closure Management:**
  - Complete the actuals budget (budget where you indicate actual costs of project).
  - Final reconciliation of the budget.
  - Final balance of payments to be made to suppliers, venue etc.
  - Final income and expenses reports.
  - Collect the food and beverage bill from The Venue.
  - Send a copy of this food and beverage bill to The Client.
  - Collect a copy of accommodation room list report from The Venue with all accounts and incidentals itemised.
  - Reconcile all invoices from Vendors, Venue and Speakers.
  - Complete the projected budget vs. actual budget spreadsheet report.
  - Ensure all invoices have been collected, reconciled and paid.

- **Design Closure Management:**
  - Returning any décor items that were rented if they are in your procession.
  - Dry cleaning of linens and materials if damaged (depending on contractual agreement in place).
  - Replacement of any lost, stolen or damaged rented stock.
  - Collecting photos that décor and design agencies took so you can add these to your portfolio.

- **Marketing Closure Management:**
  - Following up on no show invitees and getting feedback as to why they did not attend.
  - Final confirmation of number of invitees that attended event vs. number of invitees who accepted the invitation.
  - Returning left over promotional items, gifts and merchandise to owner.
  - Returning branded items such as banners, brochures etc. that were left over. These may need to be returned to The Client or Sponsors.

- **Operations Closure Management:**
  - Collect final receipts, bar bills etc. from The Venue.
  - Get final rooming list for accommodation from The Venue.

- **Risk Closure Management:**
  - Reporting on any incidents that might have occurred.
  - Action any post event items that need to be addressed for example if someone was injured at the event get information on their recovery and rehabilitation.

### COLLECTING PROJECT ARCHIVE DATA

Historic project data is an important source of information to help improve future projects.

**Typically, the following project data is archived:**
- All project planners, task trackers, contact sheets etc.
- Project concept documents.
- Project Plans.
- Correspondence.
- Meeting notes.
- Status reports.
- Contract file.
- Technical documents, files, program, tools, etc.

All records should be stored according to the information management guidelines set by the client including the following:

- Summary technical information should be electronically stored for historical reference to facilitate later review.
- The project archive should include a description of the files being submitted, the application (including version) used to create the archived materials, and a point of contact.
- In matrix organisations, the project manager should communicate to the functional manager information about the performance of the employee.
- The project manager should also make recommendations for recognition of performance as the case may warrant.

FINANCIAL ACCOUNT CLOSURE

Financial closure is the process of completing and terminating the financial and budgetary aspects of the project.

Financial Closure Includes:

- Both (external) contract closure and (internal) project account closure.
- All expenditures must be accounted for and reconciled with the project account.
- When financial closure is completed, all expenditures made during the project have been paid as agreed to in purchase orders, contracts, or inter-agency agreements.

CONTRACT CLOSURE

Contract closure is the process of terminating contracts with external organisations or businesses. It is a typical but important part of project management. It is a simple process, but close attention should be paid so that no room is left for liability of the agency.

In order to close a contract it is important to collect all of the pertinent documentation for review. This will include all of the original contracts and supporting documentation such as schedules, contract changes, and performance reports. This documentation needs to be reviewed thoroughly to ensure there are no unrealized contract issues that could result in legal liability. A thorough review of the procurement and contracting documents must include contract milestones, services provided or deliverables and documentation delivered.
To formally close a contract, the agency provides the contracted company or organisation with a formal written notice stating the completion of the contract and reason for termination. Standard verbiage for acceptance and closure is usually found in the original contract itself. It is also a good idea to keep a complete set of contractual records for the project in a safe and accessible place in case they need to be referenced at any point in the future.

**EVALUATION CLOSURE**

Evaluation is a systematic process to determine the worth, value or meaning of an activity or process. An evaluation of a meeting or event helps determine whether the objectives of a meeting or event were met and to what degree.

**WHY EVALUATE?**

In today’s environment, event and event organisers are struggling to meet demands from management for profit contributions from participants who want a meeting or event that produces results, and from stakeholders that demand accountability. Only through the evaluation process can one determine whether a meeting was successful and achieved the meeting’s objectives.

- Management uses evaluations for *general human resources decisions*. Evaluations provide input into important decisions such as promotions, transfers and terminations.
- Evaluations *identify training and development needs*.
- They pinpoint employee skills and competencies that are currently inadequate but for which programs can be developed to remedy.
- Performance evaluations can be used as a *criterion against which selection and development programs are validated*. Newly hired employees who perform poorly can be identified through performance evaluation. Similarly, the effectiveness of training and development programs can be determined by assessing how well employees who have participated to on their performance evaluation.
- Evaluations also fulfil the purpose of *providing feedback to employees* on how the organisation views their performance.
- Furthermore, performance evaluations are used as the *basis for reward allocations*.

**THE BENEFITS OF EVALUATION**

There Are Eight Purposes Or Benefits Of Meeting Evaluations, Including:

1. **Determine success in accomplishing objectives.** Every meeting should have measureable, specific, and realistic objectives. Evaluation determines if objectives were met and to what extent.

2. **To identify the strengths and weaknesses in the meeting management and design process.** This assists in evaluating where improvements can be made.
3. **To compare the meeting costs to the benefits.** With today’s bottom line, determining a meeting’s cost – effectiveness is crucial. Evaluation can compare the cost of a meeting to its usefulness or value, measured in monetary benefit.

4. **To decide who should participate in future meetings.** Sometimes evaluation provides information to help prospective participants decide if they should be involved in a meeting or trade show. Communicating these results to other potential attendees can help them decide about future meeting participation.

5. **To identify which participants were the most successful with the meeting content.** An evaluation may identify which participants excelled or were unsuccessful at learning and implementing skills, knowledge, or professional contacts from the meeting. It may point out which attendee types, membership classifications, or customer groups, enjoy the greatest success, with the meeting content and thus gain the most benefits from the meeting.

6. **To reinforce major points made to the participant.** A follow up evaluation can reinforce the information covered in a meeting.

7. **To gather data to assist in marketing future meetings.**

8. **To determine if the meeting was the appropriate solution for the specific need.** Sometimes evaluation can determine if the original problem needed a meeting solution. Too often an event or meeting is conducted to correct problems that cannot be corrected by a meeting. There may be other reasons for performance deficiencies, such as procedures, workflow, or the quality of supervision.

**STAGES OF EVALUATION**

There Are Two Stages To Evaluation:

→ **Stage 1:** Selecting the data collection method you will use.

→ **Stage 2:** Evaluating the performance and success.

**STAGE 1: DATA COLLECTION METHOD**

It is most appropriate to select a data collection method when the evaluation strategy is being developed, rather than after the meeting has taken place. The following data collection methods can be used:

1. **Data Collection Instruments:** Questionnaires, interviews, focus groups, observations, and action plans are evaluation instruments that serve as a data – gathering method.

2. **Other Data Collection Methods** include meeting assignments, performance contracts, and performance monitoring.

Design the feedback form, survey or poll post event, depending on which data collection method you have chosen, and once you have identified who you are sending it to in order to obtain data.
Feedback on a meeting, its application, and results come from a variety of sources and are
gathered through numerous data collection methods. The most popular method to evaluate a
meeting is through a questionnaire distributed to meeting attendees. Once an evaluation has
been conducted, it is essential to report the results to key stakeholders. Through communication
and action, the results can be utilised to improve future meetings and events.

Reflect on, measure and evaluate the event and performance.

It is important to reflect on, measure and evaluate the event and performance in order to improve
future practices and learning.

In order to do this, you need to reflect on, measure and evaluate:
- Own performance.
- Client satisfaction levels.
- Objectives of the event.

STAGE 2: EVALUATING PERFORMANCE AND SUCCESS

Evaluate the performance and success of the project by reviewing how the client, the customer,
the vendors, the venue and speakers delivered/provided their services. You would consider
which areas were challenging, what worked, what didn’t, what could be improved in the future
etc. Evaluation is a systematic process to determine the worth, value or meaning of an activity or
process. An evaluation of a meeting or event helps determine whether the objectives of a
meeting or event were met and to what degree.

EVALUATING THE EVENT MANAGEMENT PROCESS

Figure 33: Evaluating the Event Management Process
What Areas Are Evaluated?

All steps in the event project need to be evaluated from research and development to the execution of the event.

### Administrative Evaluation

**Evaluate The Following Administration Areas:**
- Procurement process.
- Stakeholder management process.
- Information management process.
- Time management.
- Human resource management process.
- Cost management.

### Design Evaluation

Evaluate the design strategy for the event.

*Refer to Design Strategy Section to consider which areas need to be evaluated for example:*
- **Concept and Theme Design:** Evaluate the effectiveness of the concept and theme for the event.
- **Catering Design:** Consider feedback on the catering, food and beverages and how the design of these worked at the event. Where ideas, catering design well received by customers/attendees?
- **Content Design:** Evaluate if content supported the overall message of the event linked to the concept.
- **Invitation Design:** Consider feedback received regarding the invitation design, the body of the invite, the tone and whether the invitation received the desired number of acceptances/RSVP confirmations.
- **Program Design:** Evaluate how the program flowed, where time allocations sufficient, was the program rushed etc.
- **Environment Design:** Evaluate how the set-up of the venue worked, was there enough space for people to move around, were there enough tables, chairs, did the room layout promote interaction, dancing, service of food and beverages etc.
- **Entertainment Design:** Determine if type of entertainment, choreography and show met the needs of the client and customers.
- **Production Design:** Gauge if production worked well, were audio, visual, technical and staging requirements met? Was the quality sufficient?
- **Promotions Design:** Consider if promotional items used linked the concept to the message of the brand.
Evaluate the marketing strategy for the event.

*Refer to Marketing Strategy Section to consider which areas need to be evaluated for example:

- **Marketing Management:**
  - Where marketing objectives met?
  - Where customers’ needs taken into consideration and met?
  - Was market research conducted thoroughly and correctly?
  - Where marketing personnel roles and responsibilities identified?
  - Evaluate role of promotions, public relations and sponsors.
  - Evaluate marketing budget, whether you were within budget or exceeded the budget?
  - Effectiveness of the marketing plan prior to event.

- **Invitation Management:**
  - Where the objectives or purpose of the event clearly outlined on the invitation?
  - Did the invitation go out on scheduled date?
  - Was the invitation well received?
  - Were expected numbers reached in the time frame required?
  - Rate of RSVP confirmations?
  - Number of cancellations and no shows?
  - Was information on invitation sufficient, clear and brand/theme appropriate?
  - Was RSVP schedule process managed efficiently?

- **Materials Management:**
  - Evaluate effectiveness of awards, prizes, brochures, posters, media kits, forms etc.

- **Promotions, Public Relations and Sponsorship Management:**
  Evaluate how promotions, Public Relations and Sponsorships were managed.

**Media Analysis**

*Media analysis of the coverage and value of all international and domestic media exposure of the Event, including television, magazines, newspapers, in-flight video and web-based magazines;*

*What media exposure was received?*

*What were the numbers of media that attended the event (media type and country)?*

*Outcomes of the exposure?*

*Summary of media coverage print - clippings, television- hours etc.*
Promotional activities and outcomes
Did the event attract local and/or national media coverage (not including event promotion)?
Details of local media.
Summary of local media coverage.

Business Leads
Was there other interest/exposure generated by the event?
Business to business leads
If the event generated international business leads,
Please indicate the type and number of leads in total
What is the total estimated value of these business leads?

Operations Evaluation

Evaluate the marketing strategy for the event.

- **Attendee Management:** Evaluate areas such as admissions controls, crowd management, and queuing times at registration stations, where invitees attended to in a timely manner, flight management, gifting management, housing management, were special requests delivered, and transport and travel management. Feedback from invitees will play an important part in this section and will indicate the success of these management areas. For example if attendees commented on how long they stood in the queue to register or that they did not receive the correctly spelled name badge this would show which areas of planning where not properly managed.

- **Brand Management:** Evaluate if there were any areas of concern with regards to printed elements, logo merchandise, and general marketing items. For example you might have received feedback that there was not sufficient visible branding at the hotel for the guests to find their way.

- **Catering Management:** Use the catering checklist in Operations Section as a guide to evaluate food and beverages.

- **Communication Management:** Evaluate whether there was sufficient communications between all stakeholders. Challenges in events planning generally come from lack of or insufficient communication. Evaluate it everyone in the project was communicated to and whether everyone was on the same page throughout the process. As stakeholders to give feedback on this.

- **Content Management:** Collect feedback on how presentations were evaluated by attendees. Where the presentations too long, too short, were speakers clear and succinct and were the message and method of delivery impactful?
- **Décor and Design Management**: Evaluate the management process. How did supplier perform, was décor and design of good quality, did it tell the story and relate to the theme etc.

- **Entertainment Management**: Evaluate the performance of the entertainment booked. Did they deliver a top quality act? Was the choreography good? Were they well received by the audience?

- **Housing Management**: Evaluate room block booking procedures, processes, reservation methods, arrival and departure of guests, hotel providers performance and level of customer service offered, services offered to guests etc.

- **Infrastructure Management**: Evaluate areas such as was there enough parking, toilets and general venue facilities? Where they accessible for attendees? Where their issues in the loading bay areas that effected set up and break down? Was the venue helpful in resolving issues relating to housekeeping etc.?

- **Logistics Management**: Reliability of travel and transport suppliers. Evaluate if there were any issues around travel or transport that affected the event or the attendees.

- **Site Management**: Evaluate the overall performance of the venue personnel in their ability to resolve issues, provide assistance and deliver on scope items.

- **Speaker Management**: Evaluate speaker’s performance, delivery and how speakers were rated by attendees.

- **Technical and Production Management**: Evaluate the quality of technical equipment, how production team performed etc.

- **Way Finding Management**: Consider if there was ample information, way finding and liability signage at the event. Did the attendees have to ask where toilets or smoking areas were etc.?

### Risk Evaluation

- Evaluate the risk management process. Did any unforeseen risks, hazards, injuries occur at the event? How were they dealt with? Consider the impact and severity of them.

- Where compliance documents in place?

- Did the health and safety officer sign off all necessary documents?

- Evaluate security.

Evaluate any other areas that caused risk or hazards at the event. Outline key issues and challenges addressed in the event.
LEVELS OF EVALUATION

Phillips created multiple levels of evaluation to determine the return on investment (ROI) for training and development programs and subsequently developed an ROI methodology, which was refined through application to satisfy the needs of event organisers. Currently over 2,000 organisations are using this Phillips methodology within training and development, human resources, performance improvement, technology initiatives and now meetings and events to evaluate and calculate the ROI of these efforts.

This conceptual framework of six levels is used to create meeting objectives and the subsequent evaluation strategy and measurement plan for the meeting.

**Level 0 – Statistics, Scope, and Volume** collects data on meeting statistics as well as the scope and volume of meeting attendance, exhibitors, marketing efforts, press coverage, budgetary measures, web site traffic, and so on. Much of this information can be found in an organisation’s records, upon review of an organisation’s balance sheet, or through a scan of media coverage.

When gathering level 0 data, asking meeting attendees demographic questions about:

- Organisation for which they work.
- Industry in which they work.
- Number of years in industry in which they currently work.
- Position, title, and/or role within company/
- Number of persons that report to them.
- City, country in which they live and work.
- Age group.
- Gender.
- Professional designation.
- Education level.

When analysing the results, you may notice that some demographic groups had greater satisfaction levels or were more likely to complete and return the questionnaire. Make sure to review and examine this info before making assumptions about the larger group.

**Level 1 – Reaction, Satisfaction, and Planned Action** evaluation collects reactions to the meeting or event and can indicate the planned actions of the participants following the meeting. This level or measurements gathers info on what stakeholders indicate what they will do with the meeting content, professional contacts, or sales leads post event.

When gathering level 1 data, consider asking meeting attendees questions about:

- Importance and relevance of meeting or event to their job, organisation, interests, and career path.
- Effectiveness of speakers and facilitators.
- Usefulness of marketing materials, on - site programs, hand-outs, and so on.
- Recommendation of meeting/event to others.
- Comments on how to improve the meeting, what topics/speakers should be offered in the future.
- Intention of stakeholders to use what they have learned or acquired at the meeting/event.
- Pre – meeting marketing, registration, travel arrangements, and information.
- Meeting location, facilities, and venues and meeting rooms.
- Food and beverage management.
- Meeting content and message.
- Program schedule and timing.
- Networking opportunities.
- Vendors and suppliers servicing the event.
- Customer service experience.
- Transportation.

When gathering level 1 data, consider asking suppliers, staff and venue questions about:

- Deadlines for submitting materials, documents and plans.
- Communication of essential information about the event.
- Management and execution of marketing, registration, transportation, housing etc.
- Process followed.
- Effectiveness of event management team.

Level 2 – Learning evaluation is concerned with measuring the extent to which principles, facts, techniques, skills, and professional contact have been acquired during meeting. There are many different measures of learning, including paper – and – pencil tests, skills practices, case studies, job simulations, participant feedback, and facilitator observations.

Level 3 – Application evaluation is measured to determine the extent to which skills, knowledge, and professional contacts learned or acquired at the meeting were utilised or applied on the job or in the personal life of the attendee. Evaluations in this category may include before meeting and after meeting comparisons, observations from the participant’s superiors, subordinates, peers, and self – assessments.

When gathering level 3 data, ask meeting attendees questions about:

- Effectiveness in applying knowledge, skills, and professional contacts from the meeting back in the workplace.
- Frequency that knowledge, skills, opinions, and professional contacts have been applied in the workplace.
- Barriers and enablers to applying the meeting content.

Level 4 – Business Impacts evaluation involved monitoring organisational improvement of business measures such as increased sales, cost saving, work output changes, and quality
changes. Depending on the perspective being evaluated, these business results could be for the meeting host, attendees' employers, exhibitors, sponsors and so on.

Level 5 – ROI evaluation, addresses the return on investment for stakeholders such as the meeting host, attendees, exhibitors, and sponsors. The ROI calculation compares the net meeting benefits with the fully loaded costs of the meeting. ROI can be expressed as a benefit/cost ratio (BCR) or an ROI percentage.

SOURCES OF INPUT

When considering possible sources of feedback/input on the success of a meeting or event, there are five major categories, including:

1. The Client.
2. Event organiser and their team.
3. Meeting/event attendees.
4. Internal and external stakeholders:
   - Organisational performance records.
   - Supervisors of meeting attendees.
   - Subordinates of meeting attendees.
   - Team members or peer group of meeting attendees.
5. Vendors and suppliers.

EVALUATING EVENT ORGANISER/TEAM PERFORMANCE

The criteria or criterion that management chooses to evaluate, when appraising employee performance, will have a major influence on what employees do.

For Example: If you use the number of quotes send to potential clients as criteria to measure performance, employees may simply compile and send out quotations to fictitious people or people that did not directly asked for quotations. This will provide you with false data when you do a performance appraisal.

Management needs to be very clear on what it is that they want to evaluate.

The Three Most Popular Sets Of Criteria Are:

- Individual Task Outcomes: If end counts, rather than means, then management should evaluate an employee’s task outcomes. Using task outcomes, an event organiser could be judged on criteria such as number of events successfully completed, ability to complete the event within the budget, referrals received from an event.

- Behaviours: In many cases, it’s difficult to identify specific outcomes that can be directly attributable to an employee’s actions. This is especially true for people in an advisory or support position and individuals whose work assignment are intrinsically part of a team effort (like with event management). In the latter case, the team performance may be readily
evaluated, but the contribution of each member may be difficult or impossible to identify clearly.

- **Traits**: the weakest set of criteria, yet one that is still widely used by organisations, is individual traits. Traits such as having “a good attitude”, “showing confidence”, being “dependable”, etc. may or may not impact on task outcomes.

**Methods of Performance Evaluation**

**Self-Evaluation**

Having employees evaluate their own performance is consistent with values such as self-management and empowerment. Self-evaluations get high marks from employees themselves; they tend to lessen employees’ defensiveness about the appraisal process; and they make excellent vehicles for stimulating job performance discussions between employees and supervisors.

Evaluating your own performance would include meeting with your manager to obtain feedback on what you did well and where you need to focus in order to improve your future performance. It is also useful for the whole coordination team to evaluate the process used during the event, the way the team interacted, shared ideas, etc. Self-evaluations, however, suffer from overinflated assessment and self-serving bias. Moreover, self-evaluations are often low in agreement with superior’s ratings. Because of these drawbacks, self-evaluations are probably better suited to developmental uses than for evaluative purposes or combined with other sources to reduce rating errors. Your performance could be evaluated in a formal or informal way.

The Following Are Examples Of Questions That Can Be Asked During Your Self-Evaluation Evaluation:

**SELF-EVALUATION**

<table>
<thead>
<tr>
<th>Yes/No</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Did I achieve my goal on this event?</td>
</tr>
<tr>
<td>2.</td>
<td>Did I complete my tasks within the allotted time?</td>
</tr>
<tr>
<td>3.</td>
<td>Did I manage to perform all tasks within the specified budget?</td>
</tr>
<tr>
<td>4.</td>
<td>Did I perform to the best of my ability?</td>
</tr>
<tr>
<td>5.</td>
<td>Do I have the required skills to complete all tasks successfully?</td>
</tr>
<tr>
<td>6.</td>
<td>Did you complete all tasks successfully?</td>
</tr>
<tr>
<td>7.</td>
<td>Did I have a positive attitude throughout the event?</td>
</tr>
<tr>
<td>8.</td>
<td>Was I an effective team player?</td>
</tr>
<tr>
<td>9.</td>
<td>Did I make a positive contribution towards the team’s efforts and event objectives?</td>
</tr>
<tr>
<td>10.</td>
<td>Did I manage to carry out instructions correctly?</td>
</tr>
<tr>
<td>11.</td>
<td>Did I attend to the customer’s needs?</td>
</tr>
<tr>
<td>12.</td>
<td>Is the customer satisfied by my efforts?</td>
</tr>
</tbody>
</table>
You can also use similar questions, but instead of the yes/no option you can use a rating scale to be more specific about your performance. A scale from 1-5 could be used (for example), where 1 = Strongly Agree, 2 = Agree, 3 = Not sure, 4 = Disagree and 5 = Strongly Disagree. Scores can be added at the end and discussed with your team leader, supervisor or manager.

You may also be able to quickly identify areas in which you need to improve and you and the supervisor and compile a development plan to ensure that you address problem areas before the next event.

**Management-by-Objectives (MBO)**

The manager/supervisor and employee jointly determine the employee’s objectives that are to be achieved within a specified time period. The manager/supervisor and employee also determine the strategies for achieving the objectives and the criteria that will be used to measure the employee’s achievements.

Generally, the objective-setting process should be a joint effort between the employee and the supervisor, but in some cases the client may also be part of this process. Although the supervisor may not always be part of the process, s/he must review and approve the employee’s objectives.

On a regular basis, the employee and the supervisor/manager discuss the employee’s/team’s success in attaining the previously defined objectives. The elapsed time between the review sessions should be long enough that the employee can see progress but sufficiently short that s/he does not lose sight of the objectives. If the employee/team has been successful, a new objective can be defined.

**Two common ways to deal with objectives that are not attained by a specific date include**

- They are continued during the next evaluation period (this may not be possible if an event has already passed).
- They are modified after considering the employee’s current performance (to avoid future errors).

**The use of MBO results in several advantages:**

- It satisfies human needs, thus providing employees with the necessary motivation to achieve their objectives.
- It helps employees become more involved within the company because they believe their jobs take on added importance.
- It provides employees with definite objectives toward which they should work, thus eliminating ambiguous work assignments.
- It helps employees take considerably greater interest in performing their jobs because they have an opportunity to participate in defining their objectives, they are given the latitude to achieve their objectives, and they know their performance will be measured against how successful they are in achieving their objectives.

**EVALUATING CUSTOMER SATISFACTION LEVELS**

Customer satisfaction matters. It matters not only to the customer, but even more so to the business because it directly impacts a company's bottom line profits. Furthermore, it is one of the most important components of a company's positive brand image.

The reason why customer satisfaction directly affects bottom line profitability is quite simple: it costs far less to retain a happy client than it does to find a new client. Businesses that have been successful retaining the business of their loyal clients have shown over time to consistently increase profits from their installed client base. The impact of customer loyalty is impossible to overlook. This white paper will examine not only the significance of customer satisfaction, but also some of the factors that businesses need to consider in order to accurately define, measure, and integrate this concept into practice.

**Benefits of Evaluating Customer Satisfaction:**

- Monitoring and review at end of event is becoming increasingly important.
- Enables project outcomes to be evaluated relative to the actual costs incurred.
- Think of ways to improve quality of the response by letting participant's complete questionnaire after event.
- Difficult to execute as it involves participants.
- Participants lack of time and rushing off at events.
- Distorted perception of the event due to excitement, fatigue or emotion.

**THE TRADITIONAL MODEL**

Despite its simplicity, this traditional model has effectively laid the foundation for many sales organisations — and succeeded. In fact, you would be hard pressed to find a successful sales organisation without these entities — marketing, sales, and customer service — in place.
Indeed it would be naïve to assume that any "model" or "tradition" holds the secret to success, but the basics hold incredible value. Businesses were able to effectively earn profits and maintain positive reputations for many years following this model. Referred to many as the "marketing revolution" of the 1970s, a sudden shift toward customer-oriented marketing became the newest "trend" in business—and it has held its ground since: Business starts with the customer.

Find out what the customer wants, then produce it, then sell it. Customer-oriented business philosophy, or any of its many synonymous monikers (customer-focus, customer-centrism, relationship marketing) has since gained near ubiquitous acceptance, but surprisingly, most companies are not practicing some of the most fundamental tenets of this school of thought.

**PROFITABILITY AND THE 80/20 RULE**

The 80/20 rule has been a very popular credo of business professionals in this era of customer-oriented business strategy. It states that for most companies, **80% of their profitable revenue comes from just 20% of their clients.**

This highlights a very important element of customer-centric business: not only is it important to find the right customers, but it is even more imperative that a company retain the continued business of these loyal clients.

Understanding and fostering key relationships can create short and long-term value in customer loyalty and marketplace alliances. Surveying customers, then, makes very sound and fundamental business sense. It is hard to ignore the profound business effect of those 80/20 relationships. Surveying is critical to the health and the vitality of these relationships and to the larger business itself.

Discovering, developing and nurturing these customers, therefore, is critical to the present and future success of most businesses. Identifying key customers is only one step of creating this profitable relationship; to maximize profits; companies must continuously collect ongoing data about these customers or groups. By doing so, a business can truly create one-to-one relationships with its clients and create opportunities for continued business with up-sells, renewals, cross sells, and referrals.

This data, or customer knowledge, is critical in laying the groundwork for a successful customer retention strategy because it allows companies to maintain highly personalized, one-to-one, relevant communication.

Why is personalization so important? The high level reasons are obvious. Modern communications technology (email, telemarketing, television advertising) has simply created too much "white noise" or "static" in the marketing airwaves. As a result, people have become
increasingly callous to marketing messages. Recent research found that people are inundated with over 3,000 messages every day. Taking just office email as an example, the average office worker receives 90 to 100 messages per day in his or her inbox. Most of these e-mails are ignored, deleted, or dismissed. What messages do get read? It's simple: the ones that matter. Messages that are personally relevant to the recipient are the ones most likely to be given due time.

Personalized communication is easier said than done. Twenty years ago, mail merge technology piqued many an unsuspecting reader's attention with a simple "Dear [name]" header. Today, nearly every credit card application and mass e-mail addresses the recipient by name — again, we've grown callous to this. The shocking fact, however, is that most of these companies still feel they are fostering high quality customer relationships.

A recent Bain research study reveals that there is clearly a breakdown in communication between most companies and their customers:

- Simply stated, most companies are improperly measuring or defining customer satisfaction. These businesses continue to rest upon false laurels, consequently suffering the ramifications of lost revenue opportunities and negative branding.

- **Customer satisfaction is in the eye of the customer.** To properly measure satisfaction and to be able to effectively leverage this information to enhance profits and branding, it is imperative that customer analysis be conducted in a manner that yields an accurate profile of each individual customer. This includes correctly defining, then accurately measuring customer satisfaction. While there is no single universal method of doing so, there are certain best practices that are essential to follow when aligning a business with its customers. Once an organisation is able to gauge customer satisfaction, the opportunities for making profitable decisions are endless.

**DEFINING CUSTOMER SATISFACTION**

The most common mistake companies make when assessing customer satisfaction is asking the wrong questions. Too many companies utilize generic questions such as:

"How satisfied are you with Product A?" (Very Dissatisfied, Dissatisfied, Fairly Satisfied, etc.)

Or "Please rate your level of satisfaction with Service B:" (1 2 3 4 5 6 7…)

Vague questions generally elicit vague responses, and customer satisfaction surveys are no exception. The word satisfaction can mean different things to different people, subsequently diluting the accuracy of data a company receives. Satisfaction of a hotel catering service is very different than satisfaction with a computer purchase.
Furthermore, individual products and services have many dimensions, and thus satisfaction should not be limited to one generalized construct. For example, the quality of food may have been excellent, but the portion quantities and delivery may have been under par. Companies cannot expect respondents to divide these dimensions in their head, weight them on importance, then provide an accurate aggregate rating. The hotel catering service may receive an overall rating of "75% satisfied" but that yields little or no actionable insight. Management can do little with this information to improve the business.

By defining these dimensions, however, the final data becomes much more meaningful. The "75% satisfied" now reads:

- 95% believed the food was excellent.
- 60% thought the price was unreasonably high.
- 79% responded that the portion sizes were too small.

This is actionable insight — a manager can now make knowledgeable decisions, for example, to find more affordable food wholesalers or to make price adjustments. A customer satisfaction survey doesn't tell you what decisions to make, but a quality survey can give you valuable information to make quality business decisions.

**Best Practices:**

1. **Work backwards.** Determine what data will help you make decisions first, and then create the questions that will accurately yield that data.
2. **Be specific.** Try not to use the word satisfaction if you can help it; determine what dimensions of satisfaction are meaningful to your organisation and customers.
3. **Be complete.** If there are multiple dimensions, measure them separately. You can always aggregate data later.

**MEASURING CUSTOMER SATISFACTION**

Once you have defined the dimensions of satisfaction to measure, special consideration should be taken to properly measure them to yield meaningful data for analysis.

Determining the appropriate scale is very important to collect accurate and significant data. For instance, when using a numeric scale (e.g., 1 to 5, 1 to 10), the range needs to be defined clearly and should be utilized consistently throughout the survey. A 10-point range, for example, may not be appropriate when asking about one's level of satisfaction. Most respondents will not be able to distinguish the difference between a score of 3 or 4; as a result, data quality can suffer. Generally a 5-point numerical scale or 5- or 7-point Likert scale are accepted as effective measurement techniques for satisfaction questions.

Another important consideration when measuring satisfaction is to only ask questions that are relevant. Not only does it keep your survey length to a minimum (nobody likes long surveys),
but it also prevents the risk of measurement errors. For instance, a customer who purchased flowers should not be asked for feedback about catering. In fact, the survey respondent should never even see the question (even with a "not applicable" response choice). The question holds the risk of being randomly answered for the sake of quickly completing the survey. Having a system to display only appropriate questions has the double benefit of facilitating accurate responses and reducing survey length (again, nobody likes long surveys).

**Best Practices:**

1. Use the appropriate scale for each question type. Satisfaction scales work best when limited to 5-point numerical ranges or 5- to 7-point Likert scales.
2. Ask only relevant questions. Use a logical routing, or pathing, method to only display questions that are pertinent to the respondent in question.
3. Keep it short and simple. Shorter surveys reduce survey fatigue and increase the accuracy of data by allowing respondents to thoughtfully answer the questions. Typically, respondents should be able to complete an entire survey within 8 to 12 minutes.

**TRANSFORMING CUSTOMER SATISFACTION DATA INTO BUSINESS VALUE**

As mentioned previously, measurements and data are little more than subjective insights unless they are part of an actual business plan for action. Successful companies recognize this fact and do not survey simply to get a feel for "how we're doing." Rather, the customer satisfaction survey is an integral component of one or many processes that directly impact a company's bottom line.

Satisfaction survey data can establish valuable benchmarks for production, pricing, and many other critical business processes that affect profitability, performance, and a company's brand/corporate image.

Recall the aforementioned 80/20 rule. With this in mind, a company may be able to greatly increase profits by focusing efforts on installed base marketing — cross sells, up-sells, renewals. Using customer satisfaction surveys to pinpoint the likes and dislikes of a company's "top 20" customer base can reveal valuable insight.

By having a robust database of customer analysis data, a sales organisation can, for instance, determine the best strategies for maximizing marketing and sales results. For example, if a company's "best" customers show significant affinity for a certain product, or if they are from a certain geographic area, an organisation can ramp up marketing efforts for that product or that territory.

Accordingly, this organisation can also determine which products should be discontinued or what territories should receive less advertising budgets. In either case, customer satisfaction data enables businesses to make informed decisions that can greatly increase profits.
Customer satisfaction surveys can provide extremely useful data to sales executives, who offer little more than a company profile and company information when making calls and visits. When a sales organisation can effectively implement a complete customer satisfaction program, the resulting analysis can be an excellent tool for "warming" a cold call, or sending relevant sales materials and messaging to prospects.

By analyzing buying trends and establishing associations between different data points, a sales force can approach their leads tactically. For example, if a company discovers a significant correlation between customer satisfaction data and a specific industry vertical, a sales manager can focus more call time and lead generation resources toward that industry segment.

Customer satisfaction surveys are also invaluable to the effective budgeting for production and development of products. It enables a business to avoid spending time and resources fixing trivial mistakes or developing unnecessary enhancements. Most product managers recognize the value of customer feedback when gathering requirements.

The challenge, again, is effectively collecting accurate and sufficient response data. Using the proper methodology in managing customer satisfaction feedback is essential to provide product developers with accurate information to continuously produce quality products that customers want.

**CUSTOMER SATISFACTION SURVEY BEST PRACTICES AND TIPS**

**Here are a few customer satisfaction facts that businesses should consider:**
- Increasing loyalty and customer retention by just 5% can increase profits by 75%.
- Most dissatisfied customers will eventually tell 9 other people about their problem.
- Only 4% of dissatisfied customers actually complain to the company.
- Satisfied customers, on the other hand, tell 5 to 6 other people about their positive experience.

Managing dissatisfaction, then, is a critical consideration in planning a customer satisfaction and retention marketing program.

**Best practices in customer satisfaction management**
1. **Respond in real-time.** Use automated notifications to alert appropriate managers of potential problems. Triggered alerts in real-time can help prevent a problem from elevating.
2. **Respond personally.** Maintain a robust database of customer knowledge and transactional history in order to provide personalized follow-up. No customer wants to explain his or her problem more than once.
Use the Correct Technology to Make the Survey Process Efficient

Many companies can provide a range of services to assist with the implementation of a customer satisfaction program. Choosing the right supplier is crucial to ensuring that such an initiative is carried out with business value objectives in primary focus.

A quality survey solution should be able to streamline the integration of many of the aforementioned best practices into your current business processes.

Some Things to Look For In A Survey Solution:
- An actual database of customer knowledge that dynamically serves as a central repository for all your customer information (survey history, transactional history, etc.)
- Real-time email alerts to address customer issues immediately.
- Question scoring to use variable weighting on different dimensions of customer satisfaction
- An easy to use interface with a manageable learning curve.
- Pre-survey consultation with real consultants and survey experts—not just software—that will ensure your deployment is on the right track.

REPORTING THE RESULTS

At this point you would compile a post-event report by identifying the particulars of each of the main topic areas. Use the Administration, Design, Marketing and Risk Strategies as a reference for evaluation. You will also review the overall success of the event in reaching its key objectives, determine key recommendations and review over performance of all stakeholders.

If you take the time to gather and analyse evaluation data, share the results with stakeholders. Communicating the results is as important as achieving them.

Customise the meeting results to the interests and needs of your various stakeholders. Results can be shared in face – to – face meetings, newsletters, intranet, email, or articles. Results should be communicated as soon as they are available.

When results indicate that one or more elements of the meeting did not go well or could be improved in the future, use these negative or average results as an opportunity to recommend changes to future meetings/ events.

LESSONS LEARNT

After you have received feedback and you have evaluated the results you can develop a post event report as well as lessons learnt summary.

- Lessons learned are the documentation of the experience gained during a project.
• These lessons come from working with or solving real-world problems. Lessons learned
document identified problems and how to solve them.
• Lessons learned are gathered to help eliminate the occurrence of the same problems in
future projects.
• They typically provide: a brief discussion of the problem to identify its nature, source, and
impact; site any references that provide additional detail (references may include project
reports, plans, issue logs, change management documents); and general literature or
guidance used from another source; and, recording the corrective actions taken and
results.

Lessons Learned Format

• There are numerous formats for documenting lessons learned.
• Typically, each lesson learned is documented on a single page.
• The document should contain in its heading the name of the project, date, and point of
contact for the lesson learned.
• The body should describe the lesson learned in the following paragraphs:
  o **Statement Of The Problem** – Describe the problem that occurred. Provide
    sufficient detail to establish what happened.
  o **Discussion** – Describe in detail the cause and impact of the problem.
  o **References** – Provide any references used or other sources of information that
    may be helpful in understanding the problem or corrective actions.
  o **Corrective Actions** – Identify what corrective actions were taken and discuss
    the results. If a corrective action was not taken, but became apparent later,
    identify this action as well.

See example below.
Have separate events for different groups of people - more specialised rather than generic and generalised.

RSVP management system needs to be upgraded and revised.

Accommodation cannot be done manually as it’s too time consuming.

Get more feedback and history on the previous events as this is critical to success of future events.

Ensure that only 2 people are accountable for decision making and this is communicated to client’s staff so that there are no issues with overlapping/miscommunication and order being given by non-decision makers.

Water at Sun City cannot be used for catering. Need to bring in bottled water.

Way of managing venue staff/contractually.

Ensure you have confirmed whether an event is 2013 or 2014 pricing. Ensure that they do not put pricing up from one period to another.

Commissions to be stated up front for which hotels are covered. Get this in writing before proceeding with booking.

Get client to pay venue directly – liability sits with them. You still get commission.

Communicate to CEO when doors to gala dinner will be opened to ensure they do not walk in while you are still getting ready.

Gifting – do not do room drops for big numbers – rather give these out at registration.

If you have companies sponsoring gifts ensure you take photos, count stock and inform company if numbers are incorrect.

Storage NB on site.

Luggage tags important for group bookings.

Have an information desk inside your biggest room so that people have somewhere to go to ask questions.

Lunch snack packs for coaches.

Handheld loudhailers important item to have onsite.

If you have videographers – consider their platform and height of stage.

TV screens for registration with general information works well as well as screens for seating information.

Ensure your working outfit can be translated throughout day in case you don’t have time to change.

Have full working office onsite if you are there multiple days.

Front of house – set up area for you to sit.

If using a travel company in-house ensures they offer services like being onsite/help desk 24 hours/ hotel concierge/coach hostess/airport meet ad greeters.

Concession Trays worker really well and people loved them.

Have a clause in venue contract about air conditioning if it does not work on day of event? Rebate?

Venue: Do they replenish and clean rooms when you are out during breaks?

If suppliers are bringing items on site like branding do they return them via delivery for you or do you have to return these items.

Ensure your client’s database is finalised and final before sending it to you. Cannot be done in bits and pieces – increases risk.

Have a helpline/person that people can call with questions/accommodation etc.

All branding to be sent as a sample first before going to print. Ensure that you have this clause in the contract for branding service supplier. Any errors in printing at their cost.

Dimensions to always be on all items.

For food 1 item per person using barcoded id. Cannot take food for friends/colleagues.

Have a graphic designer on site at event for any changes to presentations.

Ensure scope management includes items like:

- What time vendors must be onsite to set up, breakdown and what time you expect them onsite on day of your event.
- Outline their roles and responsibilities for the day of event duration.
- Do not broach the relationship between any vendors/any services vendors require from other vendors must be done independent of you.
- Deductions from payments: Clause that states if you do vendors work you will deduct hourly rate.
KNOWLEDGE TRANSFER

Once you have compiled your post event report and your client is happy with the results and the information you can then send this to all the suppliers. This provides key knowledge transfer for vendors, venue and speakers and is crucial for their improvement and development.

CLOSE OUT AND SIGN OFF

Get The Client to sign off that the event project is now complete in its entirety. You would also have to close the procurement phase by receiving formal written notice that the contract in place is now complete.

There are a number of reasons you must complete this last step namely:
- It protects you from being liable should something happen after the event close out for example if your client requires you to come in and present the feedback to the CEO 10 weeks after the sign off letter has been completed. This would fall outside of the scope of the project and would mean The Client has to pay you for this presentation as it was never agreed to as part of the event project.
- It ensures that all your i’s are dotted and your t’s are crossed so you can move onto your next project without worrying that you have not closed off the project completely.

PROJECT CLOSEOUT TRANSITION CHECKLIST

The Project Transition Checklist provides a vehicle to verify completion of a project phase before beginning the next phase. The transition checklist used at the closeout phase focuses on completion of project tasks and satisfying acceptance criteria.

Additionally, the transition checklist forces the project team and using organisation to address the issue transfer for both the deliverable and associated documentation.

Project Closeout Transition Checklist is a list of questions that indicates necessary actions have been accomplished before completing the Project Closeout Report. The checklist provides a status column where the completion status of project elements is recorded (as one of the answers shown below).

• Y = Item has been addressed and is completed.
• N = Item has not been addressed, and needs to be to complete the process.
• N/A = Item has not been addressed and is not related to this project.
Comments or plans to complete items that have not been addressed are also documented on the checklist.
### PROJECT CLOSEOUT TRANSITION CHECKLIST

<table>
<thead>
<tr>
<th>ITEM</th>
<th>STATUS</th>
<th>COMMENT/PLAN TO RESOLVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have all the product or service deliverables been accepted by the customer?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are there contingencies or conditions related to the acceptance? If so, describe in the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the project been evaluated against each performance goal established in the project performance plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the actual cost of the project been tallied and compared to the approved cost baseline?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have all approved changes to the cost baseline been identified and their impact on the project documented?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have the actual milestone completion dates been compared to the approved schedule?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have all approved changes to the schedule baseline been identified and their impact on the project documented?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have all approved changes to the project scope been identified and their impact on the performance, cost, and schedule baselines documented?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has operations management formally accepted responsibility for operating and maintaining the product(s) or service(s) delivered by the project?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the documentation relating to operation and maintenance of the product(s) or service(s) been delivered to, and accepted by, operations management?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has training and knowledge transfer of the operations organisation been completed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have the resources used by the project been transferred to other units within the organisation?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the project documentation been archived or otherwise disposed as described in the project plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have the lessons learned been documented in accordance Project Management guideline?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the date for the post-implementation review been set?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the person or unit responsible for conducting the post-implementation review been identified?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Signatures**

The Signatures of the people below relay an understanding that the key elements within the Closeout Phase section are complete and the project has been formally closed.
PROJECT CLOSEOUT REPORT

A Project Closeout Report documents the completion of close out tasks and project performance. The report provides a historical summary of the projects deliverables and baseline activities over the course of the project. Additionally, the project closeout report identifies variances from the baseline plan, lessons learned, and disposition of project resources. The project closeout report is intended to provide a concise evaluation of the project.

The project manager typically has responsibility for preparing the report. The project manager gets input from the entire project team, and other major stakeholders. People performing different functions on the project will have different outlooks on the successes and failures of the project and on possible solutions.

Establishing the date for a future post implementation review of the deliverable is the final element in the closeout report. This date must be coordinated and agreed to by the organisation and the project manager. Typically, the project manager will conduct a project implementation review after the deliverable has been concluded.

A POST IMPLEMENTATION REVIEW

A post implementation review and report documents the successes and failures of the project deliverable. The review process should be directed by the project manager.

- The review is a collection of data from the organisation and users about the deliverable.
- The data will be used in a report that is focused on how well the deliverable performed, how well users accepted the deliverable, and what is the actual cost to operate and maintain the deliverable.
- Fundamentally, the report addresses whether or not the projected return on investment was achieved.

The report will specifically address:
- How well the deliverable solved the Business Problem.
- Project Performance Measures.
- Actual operational cost versus projected operational cost.
- User acceptance or satisfaction with the delivered product.
- Actual Return on Investment for the period versus projected return on investment.

360
The purpose and benefits of evaluating a meeting are numerous. The two most important reasons to evaluate a meeting are to determine whether the meeting objectives were met and to what degree and to identify ways the meeting can be improved in the future.

The Phillips methodology can be used to evaluation meeting/event success. There are also six major categories of data sources with meeting attendees and organisational performance records serving as the primary sources. A meeting or event can utilise multiple data collection methods depending on the meeting objectives. The most common data collection methods feature questionnaires and focus groups.

It is vitally important that data collected has validity and represents reality therefore, it is important that sufficient data is collected from your meeting population. Response rates to evaluation instruments can be improved by proper questionnaire design, leadership support of the evaluation process, thoughtful timing of the delivery and collection of instruments, communication about the evaluation plan, use of incentives, ensured confidentiality of responses, and easy submission methods.

The Phillips Evaluation and ROI Process™

![Figure 34: A systematic ROI Process Model](image-url)
This is an example of a feedback form that an event management company would give to their client in order to obtain feedback on their performance.

**CLIENT FEEDBACK EXAMPLE**

Feedback is important to us. It helps us BECOME BETTER and offer the best service we can. We would appreciate it if you could take a few minutes to answer the following questions.

1. **How would you rate our customer service, delivery time and overall flexibility to assist you throughout the event planning stage?**
   
   1 = Poor 5 = average 10 = excellent

2. **How would you rate our ability to apply the brand to the overall theme experience?**
   
   1 = Poor 5 = average 10 = excellent

3. **How would you rate the theme/concept based on past themes?**
   
   1 = Poor 5 = average 10 = excellent

4. **How would you rate our event management skills and expertise?**
   
   1 = Poor 5 = average 10 = excellent

5. **How would you rate our professionalism when dealing with your suppliers and staff?**
   
   1 = Poor 5 = average 10 = excellent

6. **Would you say we went the extra mile?**

   Yes ☐ No ☐

   Please elaborate:

7. **How would you rate our accuracy on information and communication?**

   1 = Poor 5 = average 10 = excellent

8. **How would you rate our processes, administration and coordination?**

   1 = Poor 5 = average 10 = excellent

9. **How would you rate our execution of the event and our management onsite?**

   1 = Poor 5 = average 10 = excellent

10. **Were there any areas that you felt we excelled at?**

11. **Are there any areas you felt we could improve on?**

12. **Any further comments:**

Thank you for your feedback.
**EVENT TERMINOLOGY**

**Attrition:** The difference between the actual number of sleeping rooms picked – up (or food – and – beverage covers or revenue projections) and the number or formulas agreed to in the terms of the facility’s contract. Usually there is an allowable shortfall before damages are assessed.

**Awards Banquet/Celebration:** An event, usually formal, to honor outstanding performance.

**Banquet Round:** A round table used for meal service, depending on the diameter, can comfortable seat up to 12 persons. A round can be an 8, 10 or 12 seater.

**Banquet:** A formal or ceremonial dinner held during an event, including speeches, music etc. Dinner for a select group of people, often in honor of a particular person.

**Cocktail Parties:** A cocktail party takes place during evening hours, and it can work well at a wedding, gala, business or social event. A typical cocktail party provides seating for about half the guests and serves a menu of passed hors d’oeuvres and appetizers with some stationary items.

**Conference:** A participatory meeting designed for the discussion of subjects related to a specific topic or area, may include fact – finding problem solving, and consultation. An event used by any organisation to meet and exchange views, convey a message, open a debate, or give publicity to some area of opinion on a specific issue. No tradition, continuity, or specific period is required to convene a conference. Although not generally limited in time, conferences are generally on a smaller scale than congresses or conventions. Can also be defined by a large number of individuals who discuss items of mutual interest or engage in professional development through learning.

**Congress:** The regular coming together of large groups of individuals, generally to discuss a particular subject. A congress will often last several days and have several simultaneous sessions. The length of time between congresses is usually established in advance of the implementation stage, and can be either pluri – annual or annual. Most international or world congresses are of the former type while national congresses are more frequently help annually. Can also be the meeting of an association of delegates or representatives from constituent organisations. This is also the European term for convention.

**Continuity Director:** An individual who is responsible for the introductions of the program and the flow.

**Continuity:** A smooth flow of action and narration from scene to scene.

**Convention:** An event where the primary activity of the attendees is to attend educational sessions, participates in meetings/discussions, socialise, or attend other organised events.

**Corporate Events and Dinners:** Any corporate event would fall into this domain.

**Delegate:** The representative of a particular country or organisation at a meeting.

**Dinner:** Evening meal for a group; not usually ceremonial.

**Double – Double room:** A sleeping room with two beds that is occupied by two persons

**Double room:** A sleeping room occupied by two persons. The room may have one or more beds of any type in it.

**Educational keynote:** concentrate on high – content information. A skilled speaker in this area delivers the message in an exciting and entertaining way.

**Exhibition:** A display for public view of products or promotional materials for the purpose of public relations, sales, and/or marketing; also known as exposition, industrial show, or trade show.

**Facilitator:** A trained mediator who guides discussion and decision making in small group meetings.

**Gala:** Gala events take place at large venues and often involve a few hundred guests. The occasion for a gala may be to celebrate milestones, raise money etc. The menu varies from cocktail – party fare to a multi-course dinner. Cocktail or formal attire is required for a gala. All can be described as the outstanding social event of an event, including a formal meal, speeches, and entertainment.

**Guest:** A person who pays for the services of an established such as a hotel. A person who accompanies an attendee to an event. This person can be a spouse or significant other.
Incentive events: possess a two–fold purpose: To reward and to motivate.

Inspirational keynote: speakers often base their message on their life obstacles. These messages encourage people toward higher aspirations.

Keynote speeches: Used as official opening sessions, because their purpose is to rev up the audience and set the tone for the entire event. They can also be used at a luncheon, dinner, or banquet or to wrap up the event. Commonly 30–90 minutes. Choose a celebrity; best-selling author or expert.

Liability Insurance: An insurance policy that protects you in the event that there is bodily injury or property damage to other people. The liability can be because of negligence or a failure to live up to promises made under a contract.

Lunch: A light noonday meal, sometimes with speeches or presentations. Can also be called luncheon.

Master of Ceremony: An individual who introduces persons or elements of an event. Usually presides over the program.

Meetings: are gatherings of individuals who meet for an uninterrupted period of time. These regularly held events, usually for internal staff, are agenda driven and focus on a single topic.

Motivational keynote: offers a thought provoking message to arouse excitement. A good motivational speaker delivers a message that has a long–lasting effect on the audience.

Opening Ceremony: The formal general session at the beginning of a congress or convention.

Participant: An individual performing an assigned role in a program or event; frequently used incorrectly to mean attendee; also known as a program participant.

Presenter: An individual discussing and explaining a given topic in an educational session.

Product launch: is used to present and market a new product. A workshop provides attendees with an opportunity to practically apply knowledge they’ve been given. A successful workshop educates attendees and provides then an opportunity to practice and improve their skills.

Public meetings: are called by local governments, companies, and organisations that want to share information with the general public. A conference is a series of speeches and presentations centered around one main theme. Conferences usually involve an extremely large number of attendees, so audience participation generally isn’t practical. Smaller and more interactive than a conference, a seminar is designed to transmit information to attendees and to stimulate and accommodate conversation on the topic being addressed.

Quad room: Room with at least two beds occupied by four persons.

Retreats: These are a series of interconnected meetings that, because of their sensitive nature, importance, or both, are held off – site so that distractions are kept to a minimum.

Room Block: Total number of sleeping rooms that are utilized and attributable to one event.

Seminar: This type of presentation is usually given to a small group of people whose members are expected or required to have a certain level of expertise in the area. They are interactive and feature intense discussion sessions that can last several hours or days. These are generally educational sessions. A lecture, presentation, and discussion under the guidance of an expert discussion leader allowing participants to share experiences in a particular field.

Session: is a series of meetings that can last for days, and even months for example, a session of Congress. A session requires a formal adjournment to end, but a meeting ends when participants part company. The general session or plenary session of a conference is one that all conference participants attend. A concurrent session or breakaway session of a conference is a sub session designed to focus on the individual interests of smaller groups of participants.

Single: Sleeping room occupied by one person. The room may have one or more beds in it.

Speaker: An individual who presents an address on a specific topic or topics, including keynote. A general session or seminar leader who is a topic specialist. A trainer or workshop leader who allows for group participation and interaction.
Symposium: A meeting of a number of experts in a particular field, at which papers are presented and discussed by specialists on particular subjects with a view to making recommendations concerning the problems under discussion.

Triple: Room with at least two beds occupied by three persons.

Weddings: A wedding is a union between two people who wish to spend their lives together. It is customary to celebrate the union with a celebration among family and friends. Weddings can be small or large and can be elaborate. As a wedding planner, you must be open to new ideas as well as be familiar with traditional wedding customs of different ethnicities.

Workshop: These presentations provide intense hands-on learning experiences. The speaker is termed a facilitator. They are normally from 90 minutes to a full day. Facilitators generally have expertise in the area. It can also be described as a training session in which participants develop skills and knowledge in a given field. An event designed to stimulate intensive discussion and compensate for diverging views in a particular discipline or subject. An informal public session of free discussions organised to take place between formal plenary sessions on a subject chosen by the participants or on a special problem suggested by the organisers.
JANNA GERS COUTO
CMP (CERTIFIED MEETING PROFESSIONAL®)
TRAINER, INDUSTRY PIONEER, THOUGHT LEADER.

Janna is one of the event industry’s thought leaders. She is the owner of The Hedgehog Event, a South African based event management training company. For over 10 years she has designed and produced corporate experiences and she has trained over 500 corporate companies, event management companies and event professionals. She has been instrumental in raising industry standards ensuring that event professionals are fully confident and competent. Her love for helping people achieve their goals has led to her developing a specialised company that focuses on event training and solutions that educate and empower adult learners.

Having a BA Honours Degree in Industrial Psychology has helped her understand people’s behaviour and attitudes in the workplace and how these can be improved through training and management systems. She also obtained a Certified Meeting Professional Certification, an internationally recognised benchmarked qualification for event professionals which only a handful of professionals (in South Africa) have gained.

Her training and events experience has come from working for events and training companies both in South Africa, and in the abroad. Her primary focus is on providing solutions to event organisers within the events industry so they can overcome their event challenges and can plan like a pro.

Being part of conceptualising, designing, implementing and managing spectacular events for companies like British Airways, SABMiller, Standard Bank, O’Keeffe and Swartz, Sasol Oil, Sasol Gas, Sasol International, SAMRO, UCS Solutions, The PGA (Professional Golfers Association) of SA, Coca-Cola, Builders Warehouse, Junk Mail and South African Bureau of Standards just to name a few, has allowed Janna to apply what was learnt to her books and training programs. These learnings have been infused throughout so that event organisers skip the trial and error part and go straight into planning like a pro. She’s been there, done that and got the T – shirt. Her wealth of knowledge and expertise will ensure that event organiser’s events are just as imaginative and spectacular and knock the socks off their bosses and customers.

Sharing her event experiences and helping event organisers get super smart puts fire in her belly. It makes her hop out of bed bright and early every day knowing that she can make lives better.
REFERENCES

Professional Event Coordination, Written by Julia Rutherford Silvers
Wiley Events, Published 2004 John Wiley and Sons Inc.

Time Management, Proven Techniques for Making the Most of Your Valuable Time,
Written by Marshall J. Cook, Published 1998 Adams Media Corporation

Event Marketing, Written by Leonard H. Hoyle
Wiley Events, Published 2002 John Wiley and Sons Inc.

Meeting and Event Planning For Dummies, Written by Susan Friedman, CSP
Wiley Publishing, Published 2003 Wiley and Sons Inc.
ISBN 0-7645-3859-4

Mind the Gap, Written by Graeme Codrington and Sue Grant – Marshall
Penguin Books, Published 2004
ISBN 0-143-02445-0

The Event organiser's Bible, Written by DG Conway
How to Books, Published 2006
ISBN 9781845281342

Time Management for Event organisers, Expert Techniques and Time – Saving Tips for Organising Your Workload,
Published by Wiley 2005
ISBN 0470836261

The Business of Event Planning: Behind – the- Scenes Secrets of Successful Special Events, Written by Judy Allen.
Published by Wiley, 2002.
ISBN 047083188


Professional Meeting Management: Comprehensive Strategies, Conventions and Events, Fifth Edition: Professional
Convention Management Association.

Professional Event Coordination, Written by Julia Rutherford Silvers
Wiley Events, Published 2004 John Wiley and Sons Inc.

Time Management, Proven Techniques for Making the Most of Your Valuable Time,
Written by Marshall J. Cook, Published 1998 Adams Media Corporation

Meeting and Event Planning For Dummies, Written by Susan Friedman, CSP
Wiley Publishing, Published 2003 Wiley and Sons Inc.
ISBN 0-7645-3859-4

The Event organiser's Bible, Written by DG Conway
How to Books, Published 2006
ISBN 9781845281342

The Business of Event Planning: Behind – the- Scenes Secrets of Successful Special Events, Written by Judy Allen.
Published by Wiley, 2002.
ISBN 047083188

The Art of The Event, Written by Monroe
Wiley Events, Published 2006 John Wiley and Sons Inc.
ISBN9780471426868

Special Event Production –The Resources, Written by Doug Matthew
BH publishers

367
Event Design and Experience, Written by Graham Berridge
BH publishers

Professional Event Coordination, Written by Julia Rutherford Silvers
Wiley Events, Published 2004 John Wiley and Sons Inc.

Meeting and Event Planning For Dummies, Written by Susan Friedman, CSP
Wiley Publishing, Published 2003 Wiley and Sons Inc.
ISBN 0-7645-3859-4

The Event organisers Bible, Written by DG Conway
How to Books, Published 2006
ISBN 9781845281342

The Business of Event Planning: Behind – the- Scenes Secrets of Successful Special Events, Written by Judy Allen.
Published by Wiley, 2002.
ISBN 047083188

www.suite101.com
www.primasoft.com
www.ehow.com
http://eventplanning.about.com
www:Miami.edu
www.printablecontracts.com
www.howto.co.uk/the event organisers bible
www.event.com
www.leonlce.com
www.management-hib.com
www.brighthub.com

http://books.google.com/books?id=fH3hD3MkIMYCandpg=PR101andddq=commercialization+of+the+olympic+gamesandei
ISBN 0805851682.
Deitrich Dorner in The Logic of Failure - 1997 Addision Wesley MA
INDEX

9
9 steps to managing an event, 27

a
above the line (atl), 10
accommodation, 262, 313
accommodation matrix, 313
administration domain, 34, 121
administration plan, 127
administrative closure, 336
administrative evaluation, 342
approval stage gate, 31
aspect ratios, 185
attendee management, 227, 229
av cue sheet: example, 314
av equipment, 278

b
banquet event orders (beos), 302
below the line (btl), 10
beverage management, 236
beverage purchasing options, 237
booking agreement contract, 293, 294
brand, 16, 20
breakdown/strike, 331

c
calculating attendance, 241
capacity requirements, 181
catering contracts, 298
catering design, 196
catering management, 230, 233, 248, 249
cost management, 155, 163, 164
critical path, 144
customer satisfaction, 351, 353, 354, 355, 356
customer satisfaction levels, 351
décor and design management checklist, 260
decor and production, 193
design domain, 34, 121, 166
design evaluation, 33, 342
design strategy, 166
designing room layouts, 179
designing the site plan, 176
disaster, 35
discovery, 28
dress codes, 171
e
email subject lines, 225
emergency, 35
entertainment, 95, 173, 193, 195, 261, 299
entertainment contracts, 299
entertainment management, 261
environment, entertainment and production
design, 173
environment: site design, 173
equipment and lighting positioning, 280
evaluating communication, 257
evaluating event organiser/team performance, 348
evaluating the event management process, 341
evaluation closure, 339
evaluation levels, 346
event and design planning, 121
event concept, 74
event design process, 4, 167
event executive summary, 304
event management, 4, 11, 12, 27, 28, 29, 149,
323, 341
event management process, 27

concept and theme design, 170
confirmation stage gate, 30
content design, 204
content management checklist, 257
contract closure, 338
contract management, 293
contract rider, 299
contracting with the venue/site, 301
contracting with vendors, 297
contracting/booking a speaker, 103
cost management, 155, 163, 164
critical path, 144
customer satisfaction, 351, 353, 354, 355, 356
customer satisfaction levels, 351
démon and design management checklist, 260
decor and production, 193
design domain, 34, 121, 166
design evaluation, 33, 342
design strategy, 166
designing room layouts, 179
designing the site plan, 176
disaster, 35
discovery, 28
dress codes, 171

email subject lines, 225
emergency, 35
entertainment, 95, 173, 193, 195, 261, 299
entertainment contracts, 299
entertainment management, 261
environment, entertainment and production
design, 173
environment: site design, 173
equipment and lighting positioning, 280
evaluating communication, 257
evaluating event organiser/team performance, 348
evaluating the event management process, 341
evaluation closure, 339
evaluation levels, 346
event and design planning, 121
event concept, 74
event design process, 4, 167
event executive summary, 304
event management, 4, 11, 12, 27, 28, 29, 149,
323, 341
event management process, 27

concept and theme design, 170
confirmation stage gate, 30
content design, 204
content management checklist, 257
contract closure, 338
contract management, 293
contract rider, 299
contracting with the venue/site, 301
contracting with vendors, 297
contracting/booking a speaker, 103
cost management, 155, 163, 164
critical path, 144
customer satisfaction, 351, 353, 354, 355, 356
customer satisfaction levels, 351
event marketing, 9, 13, 209, 210
event marketing roi, 213
event operations executive summary: example, 305
event plans, checklists and templates, 124
event process approach, 122
event strategy, 88
experiential marketing, 15
feasibility studies, 68
financial account closure, 338
flight and transport schedule, 315
food, 235, 241, 242, 246, 248, 250, 310, 330
food and beverage etiquette, 246
food and beverages matrix: example, 310
food service styles, 242
gantt charts, 146
gift management, 228, 326
goals and objectives, 56, 57
halaal, 243
hospitality rider:, 299
housing checklist, 265
housing management, 229, 262
human resource management, 148, 152, 153
implementation, 32
independent contractors, 300
information management (im), 129
infrastructure management checklist, 267
invitation design, 205
invitations, 206, 219
kosher, 245
lessons learnt, 357, 359
letter of confirmation:, 299
light levels, 281
lighting plot:, 299
logistics management checklist, 269
managing stakeholders, 327
marketing, 4, 9, 10, 13, 14, 15, 29, 30, 31, 32, 33, 34, 60, 75, 86, 109, 121, 125, 205, 208, 209, 212, 214, 217, 218, 219, 288, 322, 323, 337, 343, 357, 369
marketing domain, 34
marketing evaluation, 343
marketing mix, 15
marketing plan, 209, 213, 218, 219
marketing strategy, 208, 211
menu planning, 238
milestones and time-lines, 140
music licensing, 282
needs assessment, 44
network diagram, 141
operations domain, 34, 121, 226
operations evaluation, 33, 344
operations strategy, 226
organogram, 4, 151, 152, 153
parking, 270
paying for an open bar, 238
performance evaluation, 349
phillips evaluation and roi process, 363
pitch and proposal checklist, 109
pitch and the proposal, 107
planning and design, 31
policies, procedures and practices, 151
post implementation review, 362
procurement management, 128
program design, 197
program flow and time keeping, 326
project execution, 33
proposal delivery, 30
public communications plan, 255
public relations, 216, 217
qualification meeting, 108
quality management, 154
queues, 191
registration, 191, 229, 325
registration layout design, 191
research and development, 29
rider, 95
risk, 29, 30, 31, 32, 33, 35
risk domain, 35, 121
risk evaluation, 345
risk management, 30, 33
rsvp schedule, 222, 223
safe capacities, 183
screens and projection, 279
securing speakers, 101
selecting and contracting caterers, 90
selecting and contracting entertainers, 91
service ratios, 239
set up, 168, 183, 281, 310, 323
set up and sound checks, 281
setting tables with glassware and cutlery, 247
site dimensions, 180
six ps of event marketing, 214
sound and audio-visual, 274
speaker brief, 272
speaker engagement contract, 293, 296
speaker management, 272
speakers, 39, 89, 305, 313, 329
special meal requirements, 243
stage direction, 278
stage plot, 299
stages of evaluation, 340
staging, 184, 193, 277
stakeholder management, 128, 129
stakeholders, 38
step 1: discovery, 28
step 2: research and development, 29
step 3: proposal delivery, 30, 107
step 4: confirmation stage gate, 30, 115
step 5: planning and design, 31
step 6 approval stage gate, 31, 288
step 7: implementation, 32, 292
step 8 event execution, 33, 320
step 9 closure, 33, 336
step five: event and design planning strategy, 121
step one - discovery, 43
step two – research and development, 67
steps to developing themes/concepts, 79
supplier selection, 89
swot analysis, 69
table numbering, 189
technical production management, 274
technical rider, 299
the client brief, 43
the client interview, 45, 46
through the line, 10
time management, 132, 147, 148
transport management, 231
types of speakers, 102
vegetarians, 243
vendor contract, 293, 294
venue hire agreement, 293, 295
venue/site selection process, 96
way finding management, 283
whs, 27, 37
work breakdown structure, 134, 135, 138, 147
work breakdown structure, 133, 135