

This Guidebook

is for You



Welcome to the fabulous world of event planning! If you have an event, meeting, or party to produce, plan, or coordinate, you have come to the right place. Events do not just happen by themselves; they are well planned, specifically orchestrated, and extremely coordinated. This is what you will learn from this guidebook. Preparation is the key to any successful event. Remember, we as planners are responsible for the education, entertainment, feeding, housing, safety, and care of all attending or participating in our events.

This practical guidebook is designed and dedicated to saving you time, money, and frustration, without omitting any of the necessary steps. It will provide the particulars that make up the big picture of event planning, giving you advice, opinions, suggestions, tried and true methods, hints, tips, instructions, and organizational plans. It will take you from the concept to the thank-you notes. We've included real life stories to motivate you to get started on your own event.

There is always something new or different to enhance the logistics and creativity of planning an event. Things are changing all the time, whether it is new technology, new ways to "green" your event, Web or

Internet services and applications, new or remodeled venues, contracts, or insurance laws; it is wise to keep up with new developments in all of these areas. Even if you have been directing events for a long time, this book may teach you a new thing or two. Constant and continuing education is a common sense necessity in today's ever changing landscape.

For those of you new to event planning, this book will direct your moves, help organize your time, provide you with resources and suggestions, keep you focused, and allow you to look as though you have been an event planner for years. Best of all, it may keep you from making the costly and time-consuming mistakes thousands of planners have made before you. Just one or two of the tips suggested in this book can save you a large percent of money on one event alone and possibly save your job as well! Just read, follow, listen, learn, and be flexible. One of the most important characteristics of an event planner is flexibility. It is part of the job. We want to make the planning experience a fun and thrilling time for you because there is always room for one more successful event planner in this vast and infinite world of events.

SCOPE

The information in this guidebook is applicable to all events whether it is the Academy Awards, Uncle Steve's 60th birthday party, or the annual conference for the Sierra Club. Each event has distinct characteristics, but they all have common threads weaving in and out of the planning process. These universal threads are only one aspect of what this guidebook presents. We introduce and lead you through step by step details essential to designing and producing successful, memorable and extraordinary events. We help you make smart decisions during the entire process so that you are not reinventing the wheel.

We cannot cover everything you need to know about event planning or prepare you for all surprises, but we do offer the groundwork, a solid base of helpful information. It is your job to build on this foundation. Basic materials, tools, and the draft schematics are provided; you bring



in the subcontractors, work with the players, create the timelines, create and maintain the budget, and execute the details.

HOW AND WHEN TO USE THIS GUIDEBOOK

There are several ways to get the most out of this guidebook. You can use it at any stage of your planning process from the concept to the day of the event! Read it from cover to cover or go directly to a section relevant to your current circumstance or to complete a particular task. Wherever you are in the process, from the creation stage or deep into the details, you can find help in this book. Use it wisely and often. Keep it handy for reference, ideas, and suggestions. You will be glad you did.

Although the sections are in sequence in this book, they may not necessarily follow the flow or pertain to the decisions and strategies for your specific event. Event planning is not a linear process. One action does not necessarily or logically come after another. Some decisions are made simultaneously, while some must be subsequent to others. The process is different with each individual event. As you go through this guidebook and begin coordinating your event, you will understand. For instance, you cannot create the marketing material and begin your promotional efforts before you know where the event will be held. You need to know the dates and times and before you select a site. You cannot invite the keynote speaker or book the entertainment until the goals and objectives and defined vision for the event have been established. Even though events may not follow a defined sequence, the planning process can be simplified and organized if the guidelines and suggestions in this book are followed and close attention is paid to each step along the way.

There is some repetition of the content in the sections and chapters that is unavoidable. Planning involves activities that are not isolated but are interrelated. Consequently each chapter, while integral to the whole, is also an independent component.

BENEFITS TO THE READER

Some specifics this book will do for you:

- Save you time and money.
- Develop your organizational skills.
- Eliminate the guesswork.
- Enhance your wealth of knowledge about the event planning business.
- Answer common questions with tried and true solutions.
- Offer ideas and suggestions.
- Help you work within the constraints of time, materials, and money.
- Provide dozens of resources.
- Help define roles and responsibilities.
- Provide options to accomplish many tasks.
- Help you make intelligent decisions.
- Assist you in becoming a master in money-saving techniques.
- Teach you to enjoy the process because you are prepared.
- Make you efficient and competent.
- Provide skillful negotiating techniques.
- Prepare you to wear many hats and juggle simultaneous tasks.



- Make your efforts timely and systematic.
- Relieve frustration.
- Prepare you for the unexpected.

INTENDED AUDIENCE

Anyone who is planning an event will benefit from this guidebook! It is chock full of solutions and experience whether you are an administrative assistant, CEO, executive secretary, professional business person, manager, business owner, travel coordinator, an independent meeting planner, or just starting out in the meeting planning industry.

Whether you work in a business, organization, association, non-profit, the hospitality industry, or whatever you do, wherever you work, reading this book will be worth your time. You have valuable experience, great skills, and natural talent required to become a great planner! We intend to enhance what you know and channel those talents into creating gratifying and rewarding events.

Too often the task of coordinating an event is given to the inexperienced, over-worked employee. Maybe you have been assigned, hired, asked to coordinate, or have made the choice to put on an event. It may be job-related, a volunteer commitment with an association, an organization, a church or social event; it might be your daughter's wedding or your partner's surprise 50th birthday party. It could be a four-day conference for 2,500 or an afternoon workshop for 20. It does not matter why you are doing it or what you are doing, or whom you are doing it for, you will soon become the definitive multi-tasking planner.

WHAT SHOULD WE CALL IT?

Since "events" is a general word for hundreds of types of gatherings, it is difficult to focus or home in on one or two specific types. We will speak about all events because they have a common element: a gathering of people for a specific purpose.

Throughout this book when planning techniques differ between business/educational events or social/special events, we will describe the differences and make suggestions for each type. For example, finding the appropriate venue for a three-day conference will differ greatly from searching for the right venue for a concert or perhaps a wedding that takes place in a single day or perhaps lasts for only a few hours. All three types of events need equal organization, care, and precise planning, but the planning process may vary enough for a mention in this book.

The following chapter will help put into perspective the differences between business meetings/educational events and social/special events.

The job titles – coordinator, planner, producer, manager, director – are all used interchangeably. They all mean the person in charge of the day – to-day, hands-on business of planning an event, the one who makes it happen! The same goes for the actions such as coordinating, planning, and producing: they mean the act of doing your job. For the people participating in your event, we use a variety of words such as guest, participant, attendee, member, ticket holder, employee, or audience.

USING CHECKLISTS AND TIMELINES

Sample checklists and timelines at the end of each chapter serve as important planning tools in nearly every step in the process. They are extremely helpful in keeping you focused and on track. They are samples only, and you are encouraged to edit them to your specific needs since not all tasks will be appropriate for your specific event.

Checklists guarantee that significant and essential tasks and details are dealt with in a timely manner. Think of the checklist as an opportunity to double check everything, leaving all questions answered and tasks done. When the tasks and details on the sample checklists are not appropriate to your event, tailor them to fit your own needs and goals.



Timelines will become your best friend if you use them. They are reminders for what needs to be done and when to do it. They are another essential tool to ensure everything is covered. The complexity or simplicity of your timeline will be determined by the size and length of your event and, of course, your personality type.

Use these timelines and checklists for yourself, with your staff, committees, vendors and suppliers, and anyone else involved in the process. They are useful in your meetings, delegating responsibilities, working with vendors, and designing and publishing marketing material. They are also useful when writing the summary report at the end of the event. Good lists with notations and dates are very useful in summing up every aspect of the event when it is over.

STORIES AND PERSONAL EXPERIENCES

Many of the stories come from my own and my colleagues' experiences. They show how quick action can save an event. Often when something unplanned arises and the planner scrambles for the "fix," participants are unaware of any near-disaster. That is the sign of a great planner. These stories are true. You can learn from our mishaps, our on-the-run solutions, and perhaps get a chuckle or two.

MONEY SAVING TIPS

Where appropriate, chapters will include money-saving tips, sometimes within a specific topic. Some are negotiable with your vendors such as venue or hotel, your caterers, or the transportation industry. Some are ideas for using local talent or services. They are only suggestions but know that they have worked. For instance, do not be afraid to ask for discounts, freebies, or extras. All experienced planners do. You will be amazed at what you can get with a smile and a courteous request.

ENVIRONMENTAL SUGGESTIONS

Throughout each chapter we offer suggestions, tips, and resources to transform your event into a more progressive and environmentally resourceful product. We have suggestions that you may build upon to create your own environmental standards to use when working with others in the industry. There is an extensive chapter dedicated to environmental planning that you can take pride in when you see the enormous impact that results when “greening” the way you do business.

GLOBAL CONSIDERATIONS

Our world is shrinking so that we must pay attention to the globalization of the event planning industry and keep up with the latest trends, cultural diversity, laws, and regulations in events world wide. When appropriate, information will be integrated into the chapter or will appear at the end of the chapter to provide an international perspective on event planning.

BOOK DISCLAIMER

Event planning covers an enormous amount of information, and every event is unique. We offer you the fundamentals and suggest that you continue to learn by checking the resources listed in the back of this book.

May your events be successful, may your goals and objectives be met, and may your events be win-win situation for all. Remember, enjoy yourself, keep smiling, and have fun!

THE APPENDIX

The Appendix in this book contains timelines and checklists for all occasions, hundreds of Internet resources, and a glossary of common words used in the event planning industry. 