

1

The First Steps: Initial Planning & Budgeting

*D*esigning and producing an event—whether it be a meeting, corporate event, fund-raising gala, conference, convention, incentive or other special event—has been compared to directing a movie, but is actually more like a live stage production. It is a high-wire act without a safety net. Once your event starts there are no second chances. It's done in one take and there are no dress rehearsals. You can't yell "cut" and re-shoot the scene. You are simply not able to predict—as you can with a movie script—how your guests and suppliers will interact and react. But you can plan, prepare and then be ready for the unexpected. Never forget Murphy's Law: what can go wrong, will go wrong.

At one poorly planned event, the event planning decor, staging and lighting setup crew arrived days in advance to do an extensive setup for a poolside event complete with a dancing water light and music display at a privately owned venue. They found, to their horror, that the swimming pool had been filled in months ago but no one had notified the event planning company, and the event planning company and their suppliers had not been back since contracting to do a pre-event (pre-con) meeting, nor had they outlined swimming pool requirement stipulations in their vendor contract or event function sheets. Extensive decor and a lavish fireworks display—at

great expense to the event planning company—had to be brought in at the last moment to create a new fantasy look that would appease their client, who did not need to have that added stress mere days before what had been a long-anticipated special event.

Although you are not creating an Oscar-winning movie, it is always important to remember that you are creating something that may be a lifetime memory for someone. Any event, whether it's for 50 or more than 2,000, needs to be as detailed and as scripted as any film production, and so does the budget. Budgets for meetings, corporate events, product launches, conferences, conventions, incentives and special events can go from tens of thousands to hundreds of thousands of dollars, and today it is very common to have them run in the millions of dollars. An event program is considered successful if it has no surprises on the day of the event and at final reconciliation and exceeds event objectives.

Before you begin designing your event, you need to first determine why you are having your event or taking part in an event. This is referred to as defining the event objectives, and there can be both primary and secondary objectives in each event. Event objectives will be discussed in more detail later in this chapter. Understanding *why* this event is being held will help you (and your client) to lay out the company or client objectives—both tangible (day of) and intangible (long-term) returns—so that you can then select the right style of event that will be capable of delivering them. Using a business convention as an example, a company can be an exhibitor at a convention, an attendee at a convention or an event sponsor; be represented by a company speaker; attend seminars; or host the gala farewell, a hospitality suite or an evening event for select conference attendees. Each of these event scenarios will bring different returns to a company on their investment of time, money and energy, and it is important to see which style of event will provide the most value and produce the best results in meeting the company's objectives. *The Executive's Guide to Corporate Events and Business Entertaining*: (Wiley,

2007) provides an in-depth look at key event styles and outlines in detail the company and event objectives each will return.

Examples of Different Event Styles

- » *Board meetings*
- » *Business meetings*
- » *Client appreciation events*
- » *Conferences*
- » *Conventions*
- » *Corporate shows*
- » *Custom training seminars involving emotional and physical challenges*
- » *Employee appreciation events*
- » *Executive retreats*
- » *Gala fund-raising events*
- » *Incentive travel and premium programs*
- » *Naming rights*
- » *Product launches*
- » *Product placement*
- » *Special events*
- » *Teleconferencing*
- » *Trade shows*
- » *Webcasts*

Once you have set your event objectives and determined the best event style to meet them, you will be able to strategically design an event that will be tailor-made to target those needs (you can find explicit strategic design principles I have created and strategic planning case studies in *The Business of Event Planning* [Wiley, 2002]). The next decision is to establish the scope of the event. Two criteria will determine this: money and objectives.

Determining Your Event Objectives

In order to design an event that delivers results and a return on the investment of time, money and energy the company hosting the event expends, the event must be crafted to meet guest expectations, as well as the company's. You want to create event anticipation, maximum guest attendance and full participation in embracing the primary and secondary purpose and message behind the event.

Event objectives can be both tangible and intangible and can be met pre-event (if a qualifying sales objective, for example, is required in the case of an incentive program), during the event, and post-event, and become the bridge, platform and positioning to meeting the next level of objectives for future events. An event objective must have value to the company holding the event, those taking part in the event, and cross over from professional to personal benefits and vice versa.

For example, one company had an objective of creating an event—or a series of events—that would result in having their staff become more productive, increase morale, reduce accidents in the workplace and bring down per employee health care costs. In order to do this they focused on an employee and work environment well-being theme with the top-level performers taking part in what would turn out to be a yearly three-day all-expenses-paid incentive program to climb a 14,000-foot peak in Colorado. This main event—one of many ongoing events tied to this event's objectives—centered on achieving specific individual fitness goals and has proven to be an outstanding success, with more employees qualifying every year. Their company's health care costs have been reduced to half the region's average—which is a savings to their company of \$2,000,000 a year—and meeting this one event objective alone more than pays for their total event investment of \$400,000 per year. In addition, over the years the company has been able to bring down their worker's compensation costs from \$500,000 to \$10,000, and they have created fitter workers, who are more productive and who now have a higher morale both personally and professionally.

How Much Can You Spend?

The first thing you need to do is to establish how much money you can set aside for the event. Even the smallest event requires a serious financial commitment. You may decide that you cannot afford an event at this time or may need to do something different to bring about the results you are looking for.

Remember, it is better to wait than to stage a shoddy event on a shoestring budget. And referring back to the conference example, you may decide that the event dollars that you have available would be better spent having company employees attend the conference as participants—where they are free to network by day and not be tied to an exhibit—and hosting an innovative, private, upscale dinner exclusively for the key people you want to spend quality one-on-one time with. Sponsoring what would be, due to limited event funds, a bare-bones budget “gala” dinner would give your company more visibility, but it may not reflect the company image you are trying to project. Spending the available event dollars to entertain 50-plus guests in the manner you know is required to impress your target audience, as opposed to trying to stretch those same dollars to cover decor, entertainment, food and beverage for 1,000 conference attendees, most of whom your company will not be doing business with, and in the end producing an event that is not in keeping with your company standards, would be the way to go.

One supplier did this so successfully that their dinner event—set on the stage of a well-known theater (which was closed to the public for the evening) with the stars of the show in attendance and putting on a private performance for them—was the talk of the conference the next day and really made their company stand out. Their invited guests had taken part in an event that made them feel like stars, while those who had not been invited aspired to be on the select guest list next year. They also hoped to make a business connection with the company employees at the conference, who (because they were there as attendees and not

staffing an exhibit booth) had time to step out of the conference with prospective new clients and enjoy multiple coffee breaks, lunches, etc., with no time restraints. This company generated more industry buzz and secured future business in this two-tiered event approach than they would have had they spent the dollars they had available differently at this particular conference and time. When they assessed their company objectives—short- and long-term—they could easily see which style of event would best fit their event intentions.

It is important to always determine ahead of time how much you can spend so that you can then select the appropriate event style and plan the event to fit the budget. It is a good idea to do a rough estimate of anticipated costs and inclusions before anything else because, very often, budget approvals from the higher-ups are required before an event is given the green light.

By doing a preliminary budget based on your event vision wish list of inclusions, you will know what will be doable and what will not. For instance, if a company was planning an incentive program and their wish was for a seven-night stay in a specific destination, they would quickly be able to determine if the airfare used up the majority of the budget. If it did, they might have to decide if a three-night stay, which would keep them on budget, would also help them accomplish their goals. If it were determined that a seven-night stay was necessary, then concessions would need to be made. Perhaps they would have to choose a location closer to home, or they may need to devise a way to come up with more funding, such as by soliciting industry or supplier sponsorship of specific event elements.

Tip

To obtain additional funding, consider approaching other industry members or the company's suppliers. Be aware, however, that you may not want to align yourself with one supplier over another, or to risk crossing business ethical lines. For more information on business ethics and business entertaining, refer to *Event Planning Ethics and Etiquette* (Wiley, 2003).

The company may need to look to other means to increase their event budget or look for other creative, cost-effective solutions that could involve partnering with another company and designing an event that creatively combined what each company could bring to the table to produce an event that would be a standout.

At one very upscale book launch celebrating glamour, millions and millions of dollars' of diamonds were brought in for guests to enjoy wearing and be photographed in while they were there. One woman was sporting more than 20 million dollars' in diamonds for her once-in-a-lifetime photo. The diamonds were brought in by Brinks trucks and 20 armed guards, and the event area was turned into a seemingly diamond-dazzling fortress (but remember Murphy's Law—two guests slipped out a side door that had not been secured to enjoy a private dinner in the hotel restaurant and caused the event organizers concern). But while the impact of the millions of dollars' of diamonds was major, the cost of having the diamonds on-site was not.

At midnight all the diamonds went back and the only hard costs for this very effective event element—where the objective was to project a glamorous experience—were insurance, Brinks trucks, armed guards and a professional photographer. And the luxury jewelry store that supplied the diamonds ended up selling some of the diamonds the next day to guests that had attended the event. For the store, it was a chance to present their diamonds to a very targeted audience and a marketing move that paid off handsomely in sales and in attracting new clients to their jewelry store. Their creative approach to getting attention for their store incurred very manageable hard costs. Minimum dollars were spent on creating a maximum one-of-a-kind event effect and it was a very effective event partnership for the book publisher, the author and the jewelry store.

Event Vision

In order to create an event designed to fulfill your client's objectives and be everything that they hoped it would be, it is important to begin with their initial event vision. This is where you will be able to determine what

is most important to them. Event visualization—after event objectives have been set out—is your starting point for designing any event. Where you end up could be somewhere very different than you'd originally thought, but mapping out your event vision on a grid will help you to start laying out your event cost requirements. You can start to calculate backwards from the given budget to see if there is a fit or if flexibility in the budget or event needs to be found.

For example, one company had a budget of \$4,500 for doing an outdoors luncheon event for 250 guests. The budget—they were told—would have to cover tenting, table, chair, linen, dishes, cutlery, food, beverage (wine, beer, etc.), entertainment and a small take-home gift. Their vision was to hold a New Orleans-style picnic. The reality of their budget was that they only had \$18 a person to spend on all of the above. Tenting alone for 250 guests—including installation and teardown and permits and insurance—would more than exceed their entire budget. If staying with a New Orleans theme was deemed to be the most important element to help the company meet its event objectives (e.g., if they were launching an incentive program to New Orleans), a creative event option would be to take over a local jazz club on an exclusive basis and work with the facility to create decor, entertainment (taped or live), menu and an open-bar package inclusive of all taxes and service charges that would allow them to come in budget and keep the most important event elements. An inexpensive item like pralines—a traditional New Orleans treat—could be used to stay within budget and serve as a take-home gift.

My five event design principles that should be considered when visualizing an event are:

1. The Elements—All the Parts That Make Up the Event
2. The Essentials—Must-Haves
3. The Environment—Venue and Style
4. The Energy—Creating a Mood
5. The Emotion—Feelings

In-depth review of these event inclusions will be covered in later chapters, but for the purpose of designing your event vision blueprint for budgeting, here is an overview of the areas that you must consider:

The Elements—All the Parts That Make Up the Event

The first step when planning any event is to look at the big picture. Visualization must take place before you finalize your event date and even begin to look at venues. It is important to step back and take an overall look at the event requirements that carry hard costs and need to be part of your space request. The best way to do this is to lay out everything on a grid that focuses on the week of your event. More about how to use this grid will be covered in a later chapter dealing with location requirements.

Your event overview grid will provide you with valuable insight into your budgeting, event timing, logistics and orchestration, any of which could impact your final choices. It is a useful event planning tool that will evolve as your event unfolds and is the foundation upon which all your event elements will be built. Please be sure to work in pencil, as you will want to make adjustments as you move forward, or use a computer spreadsheet to construct your grid. You will want to make extra copies so that you can play with your initial event elements, arranging them in a variety of ways to find the best fit energywise to ensure you build to a grand finale and have your event end on a high note. Your event grid worksheet will lead you into event element inclusions and budget decision-making.

What you have to keep front of mind when planning your event is that each event element affects the next. If one area is overlooked, a domino effect can occur and place your event's success in jeopardy. Preparing an event overview grid right at the beginning, adapting it and adjusting it as you move forward with your plans, helps you to avoid crunch times and any unwanted surprises. By taking the time to plan in advance you will be poised to handle any last-minute changes with ease. Consideration must be given to the timing, logistics and orchestration of

all the event elements that lead up to your actual event, the day of your event and the days following your event. These elements can include:

- » Transportation of guests
- » Accommodation of guests
- » Shipping of items
- » Advance move in and setup of the venue, including rental fees, labor costs, equipment rental, union costs, meals for crew, etc., in addition to the costs for event inclusions, staffing, security, permits, insurance, etc.
- » Rehearsal space, including rental fees, labor costs, equipment rental, union costs, meals for crew, etc.
- » Day-of-event elements, including rental fees, labor costs, equipment rental, union costs, meals for crew, etc., in addition to the costs for event inclusions, staffing, etc.
- » Teardown and move out of the venue including rental fees, labor costs, equipment rental, union costs, meals for crew, etc., in addition to the costs for event inclusions, staffing, security, permits, insurance, etc.

Begin to pencil in, under the appropriate days, the schedule of event elements—your event show flow—as you are visualizing it now. At this point, you are not working with actual timing and logistics, but rather with an overview of how you see your event and pre- and post-event week unfolding. Make sure to have a calendar handy to check any critical dates that may be taking place around your selected event date, such as a major national or religious holiday or long weekend that could affect supplier delivery and guest attendance (see example grid on page xxx).

The Essentials—Must-Haves

Event “must-haves” are things that are, at the time of initial planning, nonnegotiable. They are determined by considering:

- » Hard costs, such as airfare, hotel accommodation, space requirements (move in, setup, teardown and move out, as well as storage for suppliers, rehearsal space, on-site office space, etc., which is separate from actual main meeting/event function space),

meeting/event function space requirements, meal requirements, activity requirements, etc., and all applicable taxes, service charges, permits, insurance, communication costs, staffing, and management fees (while these cost items can be negotiated and pricing concessions obtained, they need to be included regardless of the final event design and event inclusions)

- » What would be meaningful to attendees
- » What would make the event memorable to guests
- » What would capture the magic of the message being delivered to participants

Some event must-haves are not based on the dollars and cents but on emotional currency and how they touch your senses. Some are easy to include and at minimal cost, while others require more thought, planning and money. It is important to identify the event's must-haves as you begin to visualize your event. Remember to think each decision through in terms of both economical and emotional currency, in meeting an event *need* not an event *want*. The event must-haves will become the core of your event design and your event elements will naturally unfold around them. At the same time you are compiling your list of event essentials, make a list of event enhancements that, budget permitting, could be considered to elevate your event to the next level.

The Environment—Venue and Style

Event Venue

Planners who rush off to choose a venue before they have visualized their event day from beginning to end, identified their client and their event's must-haves to decide what matters most to include, and determined where they stand financially, risk overlooking the venue that would have been the perfect fit for their event, one that meets all of their needs and their budget. Consider the earlier example of doing a tented New Orleans brunch versus doing a New Orleans jazz brunch utilizing a private facility

with no additional tenting and rental charges to factor in when dealing with a budget of \$18 a person.

The initial event vision and where you ultimately end up holding the event can be worlds apart from what you originally imagined. If you design your event around a venue just to lock up a date quickly, you may end up compromising what is important to the event and miss out on something very special. You will end up planning an event to fit the building, not designing one that will deliver the results your client is looking for.

We are living in a time when events are taking place in venues that are limited only by the event planner's imagination and budget parameters. Events today are held on land, on water, underwater (restaurants and spas in the Maldives, as an example), midair (on board aircraft), sitting on top of the world and in space.

Some examples of traditional venues include:

- » Private mansions (rented or owned)
- » Hotels
- » Convention centers
- » Museums
- » Art galleries
- » Country clubs
- » Private yachts
- » Wineries
- » Private tents

But there is a world of options available to you. Events can and have taken place in theme parks, aquariums, entertainment complexes, roller-skating rinks, on theater stages, at private fly-fishing clubs, on golf courses, in tents in the middle of the desert, on swimming pools covered over for dining and dancing, in restaurants that have been taken over exclusively, on a soundstage, in converted barns, in plantation homes, on a catamaran, at a cottage retreat, at a country fair, in a retail store, on a mountaintop, in the middle of a forest, in a stadium, on a baseball field, on a rooftop, and in restaurants and nightclubs that have been closed

exclusively for the client, have private rooms or areas that can be sectioned off just for you and your guests. Guests have been transported to event sites by private barges, classic cars, and snowmobiles; on wagons filled with hay; in double-decker buses and pedicabs; and by ferry, horseback, jeeps, motor coaches and limousines.

When looking for a place to hold your event—be it traditional or unique—you will need to consider seven key points when you are laying out your event vision. More location requirements will be detailed further on in this book.

1. Location (local, out of state, out of country)

Your guest list will be a factor in deciding your event location. Where do most of the guests live and what transportation and accommodation costs will need to be included in your cost breakdown?

2. Date

What national or religious holiday or other special event (e.g., sporting, election, etc.) could affect attendance or impact labor and other costs?

3. Season

Even seasons play a part in venue selection. The same venue in different seasons can produce a different set of event logistical and budget considerations. Every season can have its own challenges depending on the type of venue you choose. For example, a tented event taking place in the height of summer, during the heat of the day, would require considering the cost of air-conditioning, backup generators or ceiling fans, while a heating system or freestanding heaters, flooring and lighting would be cost factors for a tented wedding held in early spring or late fall when it is considerably cooler during the day and night, the grass can be damp and chilly on guests' feet and it gets dark much earlier. The same applies to building sites. At one event a guest collapsed due to the heat in a quaint facility that did not

have air-conditioning. At another event held in the same location, custom fans were handed out to guests as a way to combat the heat and became a lasting memento of the event.

4. Time of day

Time of day is an important factor. Will you be the only group holding an event in the venue or will multiple events be scheduled? If multiple events are being held, will you feel as though you are in an assembly line? What happens if the event that is scheduled to take place before yours gets a late start? What happens if their guests linger? How long will it take for your suppliers to set up, and for guests to have access to the room/venue? If you are the ones holding the earlier time slot, how will you ensure that guests depart on time so that the next event can set up? Will you feel rushed and harried, and would you be better served holding your event in a venue where you will be the only event in the facility or the only event using the room you have selected?

5. Whether you are planning an indoor or outdoor affair

You can place your event at risk if you plan to have it outdoors without having a bad-weather backup. For spring, summer and fall events, a tent or a private room at the same facility can be reserved for you in case of inclement weather. The same applies for outdoor winter events. Companies opting to do a ski event need to reserve space that they can move the event to if hazardous weather conditions occur,

Outdoor events require special setup and cost considerations. For example, if you are setting up a tent, depending on your requirements, move in and setup can take anywhere from two to three days to a week and could be delayed if it rains. Time also has to be factored in for the ground to dry. Teardown and move out can take a couple of days as well. Depending on where you are holding your event, you may have to factor in site rental charges for setup and teardown days, as

the facility would not be able to rent that space to anyone else over that time period. You would also have to check labor costs for teardown on a Sunday because there may be additional charges. Other cost factors could include having the grounds cared for, or separate cooking tents for the caterers if the venue does not have a kitchen available or one that will meet your needs and security. Tents can and have blown away and having someone on hand to handle the situation immediately may help you to avert major problems. Also, there is the issue of making sure that rental items such as chairs, tables, decor, audiovisual equipment, etc., are secured overnight and during the move in, setup, teardown and move out days when people are coming and going.

6. Whether the event is taking place in one or more than one location

If you are holding your event in two different facilities, you need to consider the travel time between the two venues, if your guests can easily travel between the two locations, and how you want to stage the arrival.

7. Budget considerations

Not all venues are created equal when it comes to their terms and conditions. For example, what might be included at no additional cost in a hotel—tables, chairs, linens or specialty glasses such as martini glasses for a martini bar—is not necessarily included in the room rental cost in a convention center, museum, etc. These items may need to be brought in especially for your event and a rental fee may be charged.

Event Style

Your event style is the atmosphere or overall effect you are trying to achieve. Styles can be mixed and matched to create something new. Style is personalized. There are no “shoulds” in style and style is never about

money. If your chosen event style or theme, for example, is romance, you can have an incredibly romantic event spending hundreds of dollars, thousands of dollars or hundreds of thousands of dollars. What you have to spend may limit your options but never the overlying theme or essence of your event style.

Your event style will influence the choice of invitations, venue, guest attire, flowers, decor, music, entertainment, food and beverages. Your end result will be layers of ambiance flowing together to create your event style.

The following are samples of different event styles:

- » Traditional
- » Classic
- » Modern
- » Country
- » Cultural
- » Formal elegance
- » Casual elegance
- » Romantic
- » Fun
- » Intimate
- » Outdoor
- » Themed
- » Seasonal
- » Holiday
- » Beach
- » Sports

The Energy—Creating a Mood

Every event gives off energy. The venue, the decor, the music, the food and drink, the activities and the guest mix all contribute to the energy in the room and the mood being set. The energy you bring to your event as a result of your event design can be good or bad. Poor design planning

with regards to timing, logistical layout and included event elements can literally drain the energy from a room. This is the feeling you experience when things go flat, there is dead air, stilted conversation or awkward silences and the room becomes devoid of energy. Negative energy can fill a room when there are overlooked areas of congestion, long waits, hungry or tired guests, and insufficient seating. Choosing a room or a setting that is too big or too small for the size of the guest count can also bring down the energy in a room. Detailed information on how to stage a room for maximum effect and energy can be found in *The Business of Event Planning*.

The Emotion—Feelings

The event style you select will lend itself to conveying the emotion surrounding your event. For example, a romantic style may evoke feelings of tenderness, softness, intimacy, all wrapped up in love. An event that has a fun theme, depicting a playful nature, will give off a lighthearted warmth that is caring and affectionate with a dash of festivity. Give thought to the event style and the feelings that you want to bring out. Choose one that will capture the spirit of your event's objectives and the emotions that will make your event stand out.

Event Vision Q&A

The following questions will help you to create your event vision, determine what areas are most important to your client and guide you through budget considerations that you need to reflect on—those seemingly inconsequential items that can quickly add up to hundreds and even hundreds of thousands of dollars in unexpected costs, as in the case of the union labor costs for an extensive setup, if not factored into the very beginning stages of designing your event.

The questionnaire opens the door to discussion with your client, which will lead you into decision-making and determining what matters most to them and how it all fits into their event budget.

Event Date

- » *What year do I see the event taking place?*
- » *What time of year (season) do I visualize the event being held in?*
- » *How much event planning time will that give me?*
- » *What day of the week do I want our event to take place on?*
- » *What time of day would be my preference to have our event start?*
- » *Would the time of year, the month, date or time affect attendance?*

VIPs

- » *What VIPs will be part of our event? (This could mean adding in expenses for suites, limousines, etc., as a must-have budget inclusion.)*

Event Guests

- » *How many guests do I visualize attending the event?*
- » *Will attendees be invited to bring a guest?*
- » *What is the age range of the guests we will be inviting?*
- » *Do I see children being invited to our event?*
- » *Would any guests have any special needs, such as handicap accessibility?*
- » *Would any of the guests I would like to have at our event have to come in from out of town, state or country?*
- » *Would we be required to host out-of-town guests and entertain them pre, post and during the event?*

Invitations

- » *Am I open to invitation styles or do I have something particular in mind?*

Event

- » *Where do I see our event taking place?*
- » *Is the event taking place indoors or outdoors?*

- » *Do I see our event being a formal, festive or informal event?*
- » *What do I see the event participants wearing?*
- » *Where is the event location in relation to where guests live?*

Event Decor

- » *As the guests are arriving at the event, what do I envision they will see from the moment they arrive until they are seated? And will anything change as the event progresses?*

Event Music

- » *What do I envision event guests will be listening to on arrival and during the event? (This will help you determine space requirements, e.g. do you need to accommodate a band setup, etc.?)*

Event Lighting

- » *What ambiance does the lighting project?*
- » *What mood do I want the room to convey?*
- » *How will the event stage be lit?*

Event Arrival

- » *How do I see the guests arriving at the event? Will they be making their own way there or have drivers assigned to them? Will they come by limousine or other transportation mode?*

Event Photographs

- » *Will we be having professional photographs, videos or a live event webcast of our event?*
- » *Who will be taking the event photographs, videos or event webcast?*
- » *What backdrop would I like to see in my event photographs?*

Event Show Flow

- » *What would be of utmost importance to me to have in our event?*
- » *How do I see the event unfolding?*
- » *How long do I see the event taking from beginning to end?*

Event Room Requirements

- » *How do I see the room being laid out?*
- » *Will it be a stand-up event with scattered seating?*
- » *Will it be a sit-down affair with table seating for all guests?*
- » *If we are including dinner, will seating be open or will we be having set seating/seating chart?*
- » *Will there be food stations or buffet setups, or will food be passed or plated?*
- » *Will bars be set up in the room or will beverages be served by waitstaff?*
- » *Will a stage be required for speeches, the musicians, the DJ or the entertainment?*
- » *Will there be dancing?*
- » *Will there be any audiovisual requirements, such as rear-screen projection, plasma screens, etc., that need to be factored into the room size requirements?*

Event Audiovisual

- » *Will there be speeches?*
- » *Will a podium or microphones be required?*
- » *Will we have any audiovisual requirements?*

Event Food and Beverage

- » *What type of beverages will we be serving?*
- » *Will it be a hosted bar or cash bar?*
- » *What type of food do I see being served at our event?*

Event Departure

- » *Will there be any special fanfare as we depart, or a grand finale?*

Pre Event and Post Event

- » *What pre- and post-move in, setup, rehearsal, day of, teardown and move out expenses and space requirements do I need to factor in?*

Once you have completed your event vision and done an initial budget based on the must-haves it's time to make the key decisions that will enable you to design an event that may or may not be able to include enhancements that will bring your event to a higher enjoyment level. If you don't achieve this goal, you will still have an event that will stand on its own, designed around the essential event elements that will help you to meet set-out event objectives, including coming in on budget, or to know where to look for creative cost options for must-have inclusions to bring costs in line if need be, such as sponsorship, if appropriate.

For example, a new event budget, sponsorship and partnership consideration that is showing up more and more in event planning, has great corporate and public appeal and is becoming a must-have event inclusion is going green. At green meetings and events, the emissions are calculated—this can include duration, number of delegates, flights, number of rooms, electricity used, etc.—and then an offsetter (www.greenmeetingguide.com has a list of suggestions) that ties into your company or event can be turned into carbon offset sponsorship packages. This can bring goodwill and media coverage to the sponsoring company as well as the company hosting the event, or be factored into a company's event budget calculations if having a green meeting or event and being environmentally responsible is one of their company's objectives.

Ways to produce green meetings and events include:

- » The use of USB keys over printed handouts, which cuts paper use, can include digital information from the company and sponsors and can be branded
- » Moving from bottled water to providing reusable stainless steel water bottles that save money, cut landfill waste and are a healthier alternative (in response to health concerns regarding BPA, the main building block of polycarbonate plastic, leaching into the water) and can be logoed as well for corporate brand marketing purposes
- » Green awards for recognition of company or personal green innovations and achievements

- » Team-building events that include green or corporate social responsibility (CSR) components, such as volunteer and community service projects like tree planting, or funding and building a home for Habitat for Humanity.

If green sponsorship dollars are received and sponsors are being recognized, it's important that they be recognized in a greener way than using signage. In the past, this was the most common way to recognize sponsors but it only contributes to more waste unless the signage is reusable. Greener ways to thank sponsors include using websites, showing a looping slideshow at the event, including green sponsors' names and logos in any recordings and speaking opportunities and, if promotional material with logos is produced, ensuring where possible that recycled materials are used.

Below is a sample of a preliminary budget that allows you to arrive at a very rough estimate of the main expenses for your event. More detailed budgets will be covered in Chapter 3.

Preliminary Cost Estimates

Generally, you can get written estimates from suppliers for the various items you are considering. These will be firmed up later after the preliminary budget is approved and event requirements are detailed. For example, a caterer would be able to give you an estimated cost for a basic five-course dinner versus a five-course gourmet dinner for budgeting purposes, but the actual dinner costs would be based on final menu selection.

Sample preliminary budgets should include main costs, such as:

- | | |
|-------------------|-----------------------|
| » Invitations | » Beverage |
| » Accommodation | » Floral arrangements |
| » Transportation | » Decor |
| » Venue rentals | » Music |
| » Rehearsal costs | » Entertainment |
| » Food | » Speakers |
| » Staging | » Security |
| » Audiovisual | » Labor charges |

- » Lighting
- » Special effects
- » Photography
- » Place cards
- » Menus
- » Gifts
- » Print material
- » Promotional material
- » Insurance/risk assessment protection
- » Power charges
- » Promotional material
- » Communication costs
- » Translation
- » Shipping and handling
- » Customs
- » Staffing
- » Miscellaneous
- » Taxes and service charges
- » Event planning management fee

Make a detailed wish list that includes everything possible, regardless of cost, on a spreadsheet in Excel or other accounting software. Setting up your budget on the computer will allow you to quickly see where you are and make adjustments to costs as prices come in. You will be able to immediately see how your budget is affected when you add in and take out different event elements. Highlight the headings that absolutely must be included in your program. The remaining items are optional and can be factored in once you have established your preliminary budget. For example, if food and beverage may be a must-have but menus and place cards could be a nice event enhancement, budget permitting, or if menus and place cards are determined to be important to your company with regards to your company's presentation style, then you need to know that these costs will need to be factored into your preliminary budget in addition to food and beverage expenses.

If your preliminary cost estimates, including only the non-negotiable items, exceed your proposed budget, you will need to give serious consideration as to whether or not you should proceed with your planned event or look to where you could possibly make adjustments. For example, is choosing a basic menu but including the menus and place cards an option, or do you need to stay with a gourmet menu to fit the tone you want your event to set? If your preliminary cost estimates are

well under your proposed budget figures you can then begin to factor in your optional items.

Design Objectives of the Event Experience

The next thing to consider is the objectives of the event. Why are you holding it? What are your event—not company—goals and intentions? What do you hope to achieve? In the case of the glamour book launch, the event objective and event elements had to deliver glamour while the publishing company's objectives was to get media coverage for their book and create sales interest. To meet these objectives, they had to create an event that would be deemed newsworthy to media (television entertainment shows, talk shows, news shows, newspapers, fashion magazines, Internet, etc.).

Be clear about all of your company and event objectives—each event can have multiple layers of external and internal company objectives that need to be met. It is important to prioritize them and to see how far-reaching they can be and how one event can become a strong foundation to build on another (which needs to be budgeted for in the future as well).

For example, a company planning a sales conference may be looking to include team-building event elements that will give their employees well-being tools they need to help them grow professionally and personally so that they can do more, be more and grow themselves as well as their company. They may have an added internal company objective for their sales conference event and team-building challenge, one that would extend back to the office: reducing health care, disability, sick-time costs, or recruitment and retention expenses.

One way of doing this would be to have the company CEO lead by example and sign on to compete in a CEO Challenge. CEO Challenges (www.ceochallenges.com) designs sports competitions exclusively for CEOs to find the world's best CEO in a number of different sports. They offer CEO

Ironman Challenges, CEO Triathlons, as well as CEO Golf, Cycling, Fishing, Sailing, Skiing, Driving, and Tennis Challenges. The company whose company and event objectives include promoting well-being and active living lifestyle, as a whole or in part, e.g., just the sales force, could get behind their company and their CEO taking part in a CEO Challenge. This could include a custom Employee Wellness Program designed and launched as a team-building training event—created to fit all fitness levels. This program could then continue back at the office, with a custom fitness facility being designed on-site for employees and the CEO to continue working towards their fitness and well-being goals. And, budget permitting, weighing cost versus long-term benefits, companies such as www.personalbest.ca can be brought in to work with corporations to create the perfect fitness training center in their workplace. Personal trainers can be hired to continue to work with the company employees to help them achieve maximum results, and mini events to keep the momentum going can be staged, as can a pre- and post-company CEO Challenge event should their company CEO qualify to take part in the World CEO Challenge.

Corporate clients and their participants are taking a step away from tired and traditional themed events and incentive programs to meet their corporate objectives—many of them now cookie-cutter and no longer cutting-edge—and opting instead for custom-designed events that raise consciousness and awareness, such as the green meetings mentioned earlier or events centered around personal, as well as professional development or giving. Such events are now becoming part of their corporate environment and branding and companies are moving towards more elevated events designed strategically to give their attendees tools that they can use to enhance their quality of life at home and at work, bring balance into their day and be of great value to the individual as well as the corporation. Companies are creating an event experience for attendees that will be one or more of the following:

- » Educational
- » Enlightening

- » Engaging (connecting the company/group as a whole)
- » Energizing
- » Entertaining, but with a very exclusive educational twist

Enlightening

An example of an event built around enlightenment, bringing the mind, body and soul into alignment, and bringing balance into your life at home and at work could include building the event around yoga and bringing in a master such as Rodney Yee. Yee (www.yeeyoga.com) is one of America's premier yoga teachers and has been featured in *Time*, *People* and *USA Today*, and on the *Oprah Winfrey Show*. He travels across the country and around the world to destinations such as England, Bali, Australia and Mexico to conduct workshops and retreats. Yee is the host of more than 17 best-selling yoga DVDs and videos and author of *Moving Toward Balance: 8 Weeks of Yoga with Rodney Yee* (Rodale Books, 2004) and coauthor of *Yoga: The Poetry of the Body* (Yee and Zolotow, St. Martin's Griffin, 2002).

Corporations are realizing the benefits that training in yoga and meditation can make in both work and personal lives. Yoga is one of the greatest stress reducers, and meditation practices lead to greater creativity, better concentration and stronger relationships. The skills that participants learn will help them relate better to people and become more relaxed, present and productive in the workplace.

Yee recommends a weekend yoga retreat as the minimum time required to make a difference. The morning can begin with yoga and then move into the meeting portion of the day. Meditation can take place during the meeting on one of the breaks. This will keep attendees focused and enable them to come back refreshed and ready to begin the listening. Yoga can also be built into corporate events that have a sports element. Many top high-performance athletes—from football players to golfers—now cross-train, and yoga is a very important part of their strength, stamina, conditioning and flexibility training. A weekend corporate

retreat can be built around a sports theme, such as a golf tournament, and include yoga and meditation skills to help them perform better in their game, at work and at home. Yoga and meditation help to restore the imbalance in the body, rhythm, breathing, concentration and bring awareness and show people how to live through this practice. During a yoga retreat, participants will be entertained, acquire learning and will be self-investing. Couples and family yoga is another element that can be built into a yoga workshop. Room gifts could include yoga mats, yoga balls, and Yee's DVDs and books, as well as yoga attire.

Another example of an enlightening experience that can benefit participants at home and at work is the Equine Experience at Miraval Life in Balance™ (www.miravalresort.com) run by Wyatt Webb. Webb is the founder and leader of the Equine Experience at Miraval Life in Balance™. Webb is the number one attraction at Miraval, which is the number one spa in America, and one of the top five in the world. Webb asks his clients to do a few simple tasks with horses that reveal to him what is going on in the clients' lives, as the interaction with the horse serves as a mirror to one's relationships with other human beings. Formerly the head of the juvenile program at the renowned Sierra Tucson Treatment Facility, Webb spent years studying different therapeutic modalities and then developed his own program that brings together horses and people. Webb is also the author of *It's Not About the Horse* (Hay House, 2002), *Five Steps to Overcoming Fear and Self Doubt* (Hay House, 2004) and *What To Do When You Don't Know What To Do: Common Horse Sense* (Hay House, 2006) and is one of the most sought-after therapists in the country.

Webb's Equine Experience brings consciousness to people, and teaches them how to pay attention and how to look at what they create in their lives and in their relationships. After taking these sessions, many have found that their relationships improve 100 percent and so does a company's bottom line, because they come away knowing how to listen and get out of their own way in order to be more successful. The Equine Experience elevates and benefits daily living. It becomes a personal

experience where participants learn to become accountable. Barriers drop and they see who they truly are. After taking the course, they are able to assess how they have contributed to the stress in their home and work life. As they move through the course, they learn it is not about the work, just as it is not about the horses. The horse is internally focused and present in the moment, whereas people, unless they are taught consciousness, are externally focused. As attendees, the participants see how every move the body makes is a direct response to what they personally believe. They learn how to pay attention to what they feel, how to look at their behavior, and how to understand why they cannot live their life externally focused and why the switch to internal focus is of paramount importance to them in their personal and professional lives. They experience an emotional change and return passionate, enjoying the work they are doing.

Engaging

Events that engage the company as a whole can be designed as multitiered programs and have the added benefit of being able to be extended past the actual meeting or incentive. An event could launch the program and run over the course of a year—with mini events to keep the motivation going—culminating in a grand finale such as the CEO Challenge discussed earlier.

Energizing

Team building or group activities—held during a meeting, conference, incentive or stand-alone event—are now being focused on personal well-being and active living activities that are designed specifically to deliver an infusion of new energy and vitality to an individual, as part of an event's and company's objective that can benefit the individual both at home and at work and again can be multitiered. For example, in the winter, a day of play on the ski slopes (or snowshoeing or cross-country skiing) can be followed by a great “après” relaxation experience in the heart of nature at a

facility such as Le Scandinave Spa Blue Mountain (www.ScandinaveBlue.com), as can a day of personal training, mountain biking, hiking or golf during the summer. A personalized logoed robe (initials and company or theme logo) or logoed stainless-steel water bottle (which adds a green element) that guests can use at home as well as during their visit to the spa can be the perfect gift to present participants with at arrival post-sports/active living event.

Educational/Entertaining

Providing memorable experiences with private performances has always been successful for corporate marketing and sales events. Real estate companies are now expanding on this and using celebrities to help them sell new properties by inviting selected guests—prospective clients—to an exclusive celebrity event. Corporations are now taking it a step further and creating celebrity travel events for their participants to enjoy. For example, guests can travel to Italy with a celebrity chef, shop in the markets with them and then come back to learn how to prepare healthy, wholesome meals with their celebrity chef by their side as they work together as a group to prepare that evening’s meal. The same celebrity educational travel events can be built around fashion, wine appreciation, racing, tennis, golf, etc.

No matter what the “spin,” the event’s main objective should be significant, for example launching a major product like a new car, rewarding top sales performance or bringing down costs that influence the bottom line, such as those listed above, to justify the cost of the event. Don’t use an event as an excuse to cover up internal strategies or to throw a personal party that is trying to pass as a business event. For example, staging a costly event to launch a minor product that has not sold well because of some defects will not only fail to solve your problems but also will add to them by wasting your money and tarnishing your company’s reputation. Make sure the event is worth the expenditure of time, money and energy that will be spent on the planning, operations, execution and reconciliation of it, and the time, money and energy that will be

required from your guests. Will they deem it to have been worthwhile and feel it was either educational, enlightening, engaging, energizing and entertaining, or meaningful, memorable and magical personally and/or professionally? Below are some examples of different objectives for various types of events.

Some Objectives for Different Types of Events

Meetings

- » *Provide new information about your product or company*
- » *Bring together people outside the office setting*
- » *Exchange ideas*
- » *Find solutions to existing problems*
- » *Launch a new product*
- » *Provide training*

Corporate Events

- » *Appreciate employees*
- » *Appreciate clients*
- » *Appreciate suppliers*
- » *Hand out awards*
- » *Bring together suppliers and staff*
- » *Launch products*
- » *Support a fund-raising endeavor that the corporation advocates*
- » *Raise public awareness*
- » *Enhance brand-name recognition*
- » *Celebrate milestones (50th anniversary, millionth customer or widget sold)*

Fund-Raisers

- » *Raise funds for research*
- » *Get media attention*
- » *Raise public awareness*

- » *Attract new sponsors*
- » *Solicit new supporters and donations*
- » *Increase number of volunteers*
- » *Develop a mailing list for future events or sponsorship and donation requests*

Conferences

- » *Bring a wide range of people together to exchange information and ideas*
- » *Launch new products*
- » *Recognize sales*

Incentives

- » *Create one-of-a-kind events to recognize increase in sales*
- » *Bring the top sales force together to discuss future strategy*
- » *Get the top sales force and senior management together outside of the work environment*
- » *Enlist the support of family and partners*

Special Events

- » *Get media attention*
- » *Raise public awareness*
- » *Attract new clients*
- » *Launch products*
- » *Present awards*
- » *Pay tributes*

Your event objectives will affect how you plan, set up and stage your event. If you are planning a client appreciation event where attendees at a conference may have several choices on the same evening, your objective would be to create something that will pique their interest, get them to your event, keep them there and get them interacting with your people.

For example, stockbrokers attending a conference flocked to an evening of fun, food and adventure at a brand-new entertainment complex. Motor coaches were waiting at their hotel to take them to the site and to bring them back. As guests boarded they were presented with a sealed package and told not to open it until they arrived at the private cocktail reception. Inside the kits were logoed golf towels that served a dual purpose: team designation and take-away gifts.

The first purpose of the golf towels was to divide the guests into six teams identified by different-colored towels. Each team was led by a senior member of the hosting company, allowing the company representative to spend quality time getting to know the team members. The golf towels easily clipped onto waistbands or purses and made each team member easily identifiable.

At the cocktail reception, guests were given instructions and then they set out on a two-hour adventure, taking part in something unique—a virtual-reality Olympics. Afterwards, they met for a “clock-in” dinner and an opportunity to share experiences. Scores were quickly calculated and prizes awarded. Then guests were free to stay and enjoy the facilities at their leisure, with the private area remaining if they wanted to relax and enjoy beverages, coffee and dessert. Shuttles left every half hour to take them back to the hotel if they chose to leave. Guests had such a great time that at the end of the evening most had not left. They had had an entertaining experience and the company’s objectives had been met; they had spent quality time interacting and getting to know their guests.

The second purpose of the golf towels was as take-away gifts. Too often, such gifts are ill-considered, useless trinkets, but since many stockbrokers play golf, the towel was something they could actually use, and it would serve as a visual reminder of the event.

Had the event been planned as just a cocktail reception and dinner at the facility, people might still have had a good time, but the

company's objectives would not have been met. Without the structure of the competing teams, there would not have been the same-quality interaction. If the guests had been left to explore the facility on their own they would have been too spread out, and with little to keep their interest they might have simply dropped in for a cocktail and a quick game before heading off to another event.

First Steps Questions

- » *Should I hold an event?*
- » *Do I have sufficient funds to stage an event?*
- » *How much money can I set aside for the event?*
- » *What is the purpose of the event?*
- » *Does it justify the financial outlay?*

Initial Planning

A company or individual has decided to hold an event. After preparing an event vision and preliminary cost estimate, they have concluded that they have sufficient funds and have allocated a set amount for the event. They have defined the purpose of the event and decided that it would justify the financial outlay. They are now ready to begin the initial planning for the event. During this stage, if they do not have in-house event planners they will decide whether they need outside professional help and bring in an event planning company, hire an independent event planner to work with their internal team or have their internal team work with event suppliers directly to handle their event design; manage their budget, logistics, the timing and event execution; and orchestrate as well as help them to visualize the whole thing from top to bottom.

When planning major events too many people think in terms of dollars and cents, not sense. Clients—be they corporate, nonprofit, social or wedding—need to know when and where to bring in event

planning professional assistance, including an expert in public relations, a creative director or a producer to handle event production from concept to completion. It is important that event planners do not present themselves to their clients as being a service industry—that is not the role they play—being perceived as merely order takers. Instead, they need to represent themselves, their company and the event planning industry as a valuable business sales and marketing tool that can help corporate clients, nonprofit organizations and individuals design, produce and deliver an event that has been custom created—not cookie-cutter—and strategically designed to meet and exceed their identified company, professional and personal objectives.

Event planners and event-related consultants should never be viewed as an added expense and a luxury. They can actually save money in the end, especially if they are brought in at the appropriate time. For example, a good public relations company can assist with your guest list and ensure that the *right* people are invited to your event; they can also help create press releases and press kits to get you national and international media exposure. A creative director or professional event designer works to provide you with a strategic conceptual overview of the event design, including planning, organizational, logistical and negotiating elements and the tiny details that make the magic.

Today, literally the sky—and beyond—is the limit when it comes to event planning, and professionals can expand the horizons of their clients. Space has now been used successfully to launch a new golf club, with an astronaut playing golf in space, to celebrate a magazine's anniversary celebration cover (an oversized mock-up was laid out in the desert and was designed to be seen by satellite from space); dinners (or breakfasts, lunch or cocktails) have been literally lifted to new heights by being served from a rented dining platform hanging 50 meters aboveground—held up by a crane—which can accommodate 22 guests, a chef, server and musician and be held anywhere in the world (permits permitting) or be used to have an orchestra or band play overhead of an event; and fashion shows

have used the outside of buildings to walk—or rather rappel down face forward—to launch a new designer season and to create cutting-edge buzz and media exposure for the store that held the exclusive licensed rights to the brand. An event producer or event operations staff ensures that all that is visualized becomes reality and is responsible for confirming that fire and safety regulations are met, all appropriate permits are obtained and that the proper insurance is in place.

And the same applies to event planning companies. They need to know when to bring in expertise and where and how to use the services of freelancers in order to grow their company.

Tip

Bring event planners and event-related consultants in at the appropriate time and you can save money in the end.

Costly errors can occur when the professionals aren't brought in. Imagine the fire marshal standing at the front door about to close your event down because you don't have the proper permits, have too many guests for the size of the room or you haven't met all safety regulations. How costly is that? Or what is the cost if you hold a fabulous event and you need the momentum from positive press but nothing is done about it? How costly is it if you are not on top of what is new, fresh and exciting and the media report that people bolted for the doors before dessert was served? Companies need to know where and when to bring in the professionals. Will it be dollars and cents, or sense? Know where. Know when.

Corporate Event Committee or Team

When setting up or working with a corporate event committee or team—or both in the case of a company working in sponsorship partnership with a nonprofit organization—seek to match skills, areas of interest and time availability with areas of responsibility. For example, if a committee member's job function is sales and they are expected to continue producing results while assisting with event planning, they may not have

time during the workday to be available to go on site inspections, review guest lists, etc., or be on call when month close-off is taking place and they are under the wire to close sales. Event planning time requirements are laid out—as are time-making and time-saving tips and techniques in *Time Management for Event Planners* (Wiley, 2005). You want to ensure that salesperson doesn't feel as though they are a deer caught in an oncoming car's headlights.

Remember to have one person from the corporation assigned to handle all communication with the event planning company or suppliers (if the company or organization is handling their event in-house). This ensures that suppliers are not receiving conflicting sets of instructions from a number of sources and that approval for expenditures is given to them by only those in a position to authorize them.

Type of Event

When determining the type of event, look at your targeted audience. Busy professionals may not take time out from their schedules to attend a symposium that will cut into their designated family time, but may attend if the event is designed to include their family members, such as a private showing in a theater or an exclusive booking of an entertainment center. The symposium could be held in the morning while their families are at play. They could then meet for a catered luncheon, with the balance of the day for them to enjoy the facility with their family members, or, in the case of a private showing in a theater or prime seating for an in-demand live show, the symposium could again be held earlier and a private pre- and post-meal function could anchor the entertainment element of the event. A company that was able to secure a private showing at the theater or seats at the hot, instant sell-out Hannah Montana live performance show would have no problem reaching maximum attendance at their symposium built around that family event, just as they would with a limited Cirque du Soleil performance. One company held an extremely

successful private dinner under a tent with Cirque-style performers performing overhead and special effects.

A public event looking to create an event that will generate pre-show media exposure that will serve to bring clients to their doorstep may look to partner with a company or companies that will help them to achieve that goal. For example, a bridal show hoping to draw couples, their families and their wedding parties to their event featured a million-dollar wedding cake display. Again, as in the example of the glamour book launch, a jewelry company provided gems to be used to decorate a lavish wedding cake. The show, the jewelry company and the wedding cake designer all benefited from the publicity and, once again, the cost to produce a million-dollar wedding cake was minimal (security, insurance, labor on the wedding cake) but the return was maximal for all involved.

Time Requirements

In an ideal world you would have at least a year to plan your event, even though many details still would be undetermined. Yes, it is possible to put together major high-profile events for 1,000-plus in under six weeks, but there is always a cost. You run the risk of not being able to get the most sought-after locations and entertainment. Why settle for second best if you can plan ahead?

In deciding the amount of planning time required, list everything that you will need and assign a time frame to each item. Begin with the end in mind. What needs to be done for your event to be a success? Work backwards with your calendar and start to pencil in the proposed schedule of events. Remember to build in time buffers. Take the time to research in order to determine realistic timelines. *Time Management for Event Planners* will show you how to create and build in time buffers that will work in both your personal and professional life and eliminate deadline stress.

Tip

Plan ahead and you can avoid settling for second best.

Allow yourself sufficient time to achieve maximum results. What could stop you from meeting targeted deadlines, such as a conflicting deadline or your suppliers being closed for holidays? For example, printing companies traditionally close for vacation the last two weeks in July. Be sure to check with your suppliers and to factor this into your timelines. Summer is a bad time in general—even the media are away.

Will any key people be difficult to reach or out of the office at the time of prime planning and operations deadlines? Will year-end affect timing in any way?

One gala fund-raiser had a three-month timeline to secure a venue, obtain sponsors, arrange entertainment and printing and sell 5,000 tickets at \$500 apiece. A flurry of meetings followed and the event was postponed after the company's planners concluded they would not succeed if they went ahead with their plans with just three months lead time. They would not be able to secure a quality venue or a desirable entertainer, nor would there be time to secure sponsorship dollars. The timing just could not be worked out, given obstacles such as the start of a new school year and the Jewish holidays. In the end, the plans were revised to allow for sufficient time to properly plan, secure sponsorship and contract big-name entertainment.

Tip

Don't be afraid to postpone your event if, when planning it, you realize it would do more harm than good to proceed with it. You may need more budget, more time, or a better location or date. Sometimes costs are not about dollars and cents; it can be very costly to proceed with an event if it doesn't make sense.

Visualization

Visualization is an important factor in ensuring a successful event; in fact, it is the next step after the initial event vision concept has been created. It is a process that walks you through your event in advance and allows you to see areas that could pose potential problems. It allows you to address

these areas in the planning stages and not be surprised on the day of the actual event.

For example, if your guests will be arriving all at once and there is both an up and a down escalator leading to the ballroom, picture this in your mind. You may realize that you want to have both escalators set to go up to alleviate congestion and speed entry. (At the conclusion of the event the reverse is appropriate.) This could allow you to set up two separate registration desks at the foot of the escalators and help to lessen the waiting time in lineups. In addition, you may find that you could also use two separate coat check areas.

Visualizing such things in advance will help you determine the staffing you will need to greet and direct guests, sit at the registration desk and have both coat checks adequately operated. Visualization allows you to consider all your options and to see how they affect your budget before you finalize your plans.

Try to envision your event from beginning to end. You need to be able to do a complete preliminary visual walk-through in your mind. Here's a review of some of the key questions we've suggested you will have to ask (and answer):

- » What is the purpose of your event?
- » What time of year are you considering holding it?
- » What will people be wearing? (Will a coat check be necessary?)
- » What day of the week?
- » What time of the day? (How will traffic and parking be?)
- » Who will be attending? (Will it be individuals or couples? If couples, will they be arriving together or on their own—that factor could affect how many parking spaces you need to have available for your event.)
- » What type of venue will be the best fit, the best setting, the best backdrop?
- » Are you planning far enough in advance that the best sites will be available to you?

Remember, your event is a reflection of your company image. Keep in mind that what you do today sets the tone for tomorrow and can work both for and against you in building momentum for your next event. Of key importance will be the ambiance you create, the rhythm, the flow and the schedule of events from beginning to end.

This is just your starting point—we will cover detailed specifics in another section. Create a visual image of your event. List every element that you want to include. What are the priorities—the must-haves—that will make your event a success? Have you included one major “wow” factor in your event? What atmosphere are you looking to create? What take-away memories? What perception of your company or cause? Now walk through your event from start to finish in your mind to capture critical logistical event requirements that will need to be addressed and may need to be added to your budget.

One guest on a four-night incentive program in San Antonio said, “Each day was like Christmas. Each event was like opening up one exciting gift one after another.” Events included a private golf course booked exclusively for the company’s golfers. The golfers teed off in the morning and did not return until 6 p.m. Had any guests preferred basketball to golf, going one-on-one with a celebrity player could have been arranged.

Complete makeovers were provided for those who chose to be pampered instead. The salon was entirely theirs for the day. Appointments were scheduled and limousines shuttled guests from the hotel to the salon and back. Lunch was provided and most guests did not leave but chose instead to watch the other makeovers. The transformations were amazing. Professional photographs were taken and mailed to the guests. There were many requests for additional copies.

When the winning sales executives returned to work on Monday, their motivation was high, their enthusiasm contagious. The carefully

designed and orchestrated incentive program had boosted the exact feelings the client was hoping to achieve—they had reached their objective. The San Antonio winners clearly felt taken care of from beginning to end, and their spouses were delighted as well. Every detail had been looked after and all their needs had been thought of in advance and attended to. And that all reflected directly back on the company and its image as one that took excellent care of its staff. The staff who had not met the targeted sales goals this time were motivated by the positive energy of the returning winners and were looking forward to the possibility of attending the next incentive program, which was announced at the farewell award dinner in San Antonio.

Tip

An important factor in incentive programs is that company sales targets are not excessive; they must be obtainable by all, and the number of participants who could attend the event must not be limited.

From the initial invitation to on-site operations, your event must be a true reflection of your company image. It will mirror how your business is run and your level of professionalism.

Monitoring the Budget

Cost Sheets

As you begin to plan your event, laying out your proposed budget on a cost sheet in Excel as mentioned earlier will allow you to clearly see what items can be included and still keep you within your budget. It will also show you how you are choosing to spend your money, enable you to look at alternate choices and see how they would work within your cost parameters. For example, once you have laid out your cost sheet and taken a look at where you stand in meeting your targeted budget, you may decide that for your centerpieces you can use simple candles (real or battery operated depending on the hotel and fire marshal regulations)

supplied by the hotel at no cost as opposed to a more elaborate floral arrangement, and put the money saved towards the cocktail reception and doing something special. Your goal is to create a memorable event with the right event elements in it while staying in budget. You want to ensure that you have taken all possible steps to do so. Don't wait to find out at the end of your event that you have greatly exceeded your budget projections. Your event should be reconciled as you go forward—each time you receive new costs or make adjustments or changes, your budget needs to be updated so that there are no surprises.

Since each event will have different event inclusions, there is no set formula or format for a cost sheet. As you start to build your cost sheet, walk through your event from beginning to end and start to build the outline. Remember to add in move in, setup, rehearsal, teardown and move out. Then go back and fill in the costs. Remember to get all your estimates in writing. Never accept verbal quotes. Today, staff changes are the rule rather than the exception—people are here today and gone tomorrow. You need written confirmation of what is and is not included. Make sure that your suppliers spell it out. Have them be specific when it comes to items as seemingly unimportant as tipping—are gratuities calculated as a straight percentage of the total bill, or is tipping being taxed? That amount can add up, especially if it affects both food and beverage. Similarly, taxes on food and liquor can be different—don't assume.

Find out what additional costs may be added to the final bill and make sure you include them in your budget. Some venues will bill you for your actual usage of electricity. In those cases, for your costing purposes, ask for the figures from a recent similar event that can provide you with an estimate for your budget. With entertainment, royalties must be paid to the artist (ASCAP or BMI in the United States and SOCAN in Canada). Make sure that the company that is handling your entertainment needs has included royalty details in their written proposal. Computer spreadsheet programs allow you the flexibility to

quickly see how your overall costs are affected if you have 750 or 1,000 guests. You can also easily add and remove items and see how that affects the bottom line.

As you update your budget as items are added and subtracted, save a new file. Date and number them (e.g., Revision 1, Revision 2). You need to stay on top of your budget so that you can make informed decisions on what to include. As bills come in, make sure nothing is paid out until they have been reviewed. Make sure that what is submitted is what had been agreed on, with no hidden surprises. Adjust your cost sheet accordingly. As each bill is received, record the actual amount on your cost sheet and compare it to your projected figures. Are they accurate? Are there any costs on the final billing that you had not included in your original estimate? Be particularly on the lookout for items that were charged for, but not contracted and signed off on. If an item has been miscalculated, you need to see immediately how it impacts your bottom line so that you can make budget adjustments in other areas to compensate for them before your event takes place. One planner underestimated the cost of shipping the invitation packages out to participants because the final package was oversized, not regulation size as originally budgeted for, resulting in a \$15,000 unexpected charge.

Tip

Use a spreadsheet program such as Excel to track your budget elements and update them as necessary. This enables you to maintain relatively real-time files and share them with the appropriate people.

As you move from the creative planning stages of your event into the actual operation, the items you had originally decided to include may change. For example, you may decide to welcome your guests with a specialty drink that will require the rental of specific glassware, as opposed to your original plan for a standard open bar and available glassware. This would have an impact on your budget projections. Little by little, the cents add up to dollars, and the dollars can quickly escalate.

If you are not keeping your cost sheet updated, you could find that you have blown your budget. By constantly updating your cost sheets, your budget will be close to being reconciled as you go into your event. It will also allow you to make those last-minute additions that often come up, and knowing where you are financially allows you to make a responsible decision, such as whether you can afford to host the bar after dinner or if you'll have to set it up as a cash bar. Perhaps you now have sufficient funds left in the budget to include a farewell gift for your guests. See Appendix A for sample cost sheets. You can also visit our companion website at www.wiley.ca/go/event_planning to access these forms, as well as additional ones not included in the book.

Payment Schedule

Before you sign a contract you need to prepare a payment schedule to see if the due dates need to be adjusted. Hotels and other venues will work with you if payments need to be changed to match your client's check runs or cash flows.

Tip

Some corporate clients have asked event planning companies to finance their event. This is very risky business to engage in, so do what you can to avoid it.

Establishing payment schedules from the client and to suppliers is of paramount importance. Event planners need to advise their client at time of contracting of payment terms and conditions and lay out dates and amounts in the contract with time buffers built in. If there are any concerns with the payment schedule you need to know prior to signing contracts with suppliers—or having your client sign contracts with suppliers in the case of clients wanting their event financed so the event planning company does not place itself at financial risk—so that terms and conditions can be adjusted if need be and signed off on.

Your cost sheet is the base from which to create your payment schedule. Your payment schedule will need to be revised should the items you plan to include or number of expected guests change. Adjust amounts accordingly before sending the next payment off. Remember when creating your payment schedule to factor in supplier cancellation penalties. Should the event be cancelled at any point ensure that you have received sufficient payment to cover those cancellation charges, as well as your management fee. See Appendix B for a sample cost sheet and the payment schedule that has been created from it. Again, for access to these samples, as well as others not included in Appendix B, please visit our companion website at www.wiley.ca/go/event_planning.



Event Design Principles Checklist

Always consider the five event design principles when visualizing an event:

- r The elements—all the parts that make up the event*
- r The essentials—must-haves*
- r The environment—venue and style*
- r The energy—creating a mood*
- r The emotion—feelings*

Event Experience Design Objectives

The five event experience design objectives considerations are:

1. Educational
2. Enlightening
3. Engaging (connecting the company/group as a whole)
4. Energizing
5. Entertaining, but with a very exclusive educational twist

... and even a mixture of all of these event elements.

Tip

An event—corporate, or social used as a business investment—is used to drive sales, build awareness, create brand loyalty, motivate performance, raise productivity and increase profitability. When thinking about event design and how to create an event experience that will drive and deliver outstanding results, use the D.R.I.V.E. event design program I have created that is detailed in *The Executive’s Guide to Corporate Events and Business Entertaining*.

D.R.I.V.E.

- D* *Define company and event objectives*
- R* *Research and develop your event vision*
- I* *Innovate and create a customized event experience using my design principles and event objectives*
- V* *Visualize your event step by step to capture all essential logistical event requirements and expenses*
- E* *Execute with detailed precision and timing*