# OFAD 30103 Events Management FOR Administrative Professionals

Bachelor of Science in Business Administration (Polytechnic University of the Philippines)



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POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
COLLEGE OF BUSINESS ADMINISTRATION
**DEPARTMENT OF OFFICE ADMINISTRATION**
STA MESA, MANILA

# INSTRUCTIONAL MATERIALS

**FOR**

**OFAD 30103**

**EVENTS MANAGEMENT**

**FOR ADMINISTRATIVE PROFESSIONAL**

Compiled by:

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**Department of Office Administration**



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To the Students

This module was provided for you to gain better understanding on the subject Events Management for Administrative Professional. At the end of each module, there will be an evaluation or assessment that has to be accomplished. Kindly compile your answers, and at the end of semester, submit it in a short or long brown envelope addressed to your course adviser.

Faculty, Department of Office Administration



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## Module 1

## Introduction to Events

Objectives

At the end of this module, students are expected to:

1. Demonstrate  appreciation on types of events;
2. Appreciate the characteristics of events;
3. Recall the categories and typologies of events.

Module 1 covers the following topics:

A. Introduction
    1. Definition and Frameworks
    2. Categories and typologies
    3. History of Events
B. Types and Characteristics of Events
    1. Types of Events
    2. Characteristics of Events
    3. Field of Specialization



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## INTRODUCTION TO EVENTS

## DEFINITION AND FRAMEWORKS

### Events

Something that happens or is regarded as happening; an occurrence, especially one of some importance.

An event is something that happens, especially when it is unusual or important. You can use events to describe all the things that are happening in a particular situation.

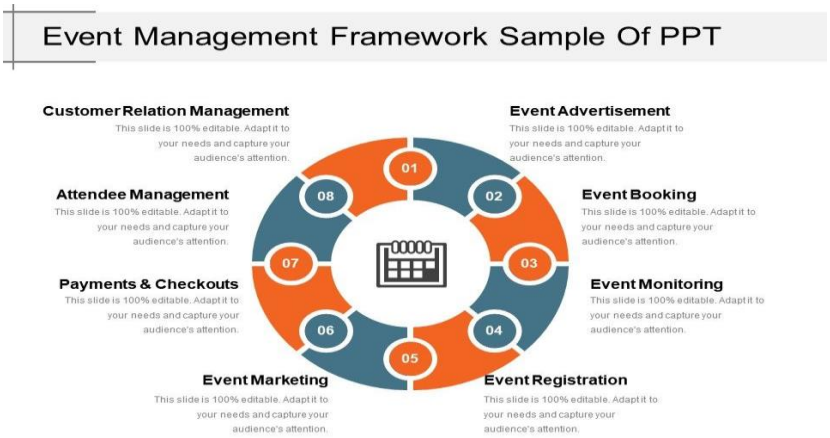
### Event Management

Event Management is the process of analyzing, planning, marketing, producing and evaluating an event. Events Management requires certain core values to be deployed to every element, process and decision to justify professional approach and achieve effective and efficient results.

### Event Management Framework

Event Management Framework (EMF) is a unique solution for managing business systems.

EMF supervises activities, analyses various data sources according to predefined parameters and makes recommendations for improvement to enable the company to better organize itself and be well equipped to react to all possible situations.




## CATEGORIES AND TYPOLOGIES



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**Type vs. Category**

- Type is a synonym of category.
- Category is a synonym of type.
- As nouns the difference between category and type
- Category is a group, often named or numbered, to which items are assigned based on similarity or defined criteria while type is a grouping based on shared characteristics; a class.

**Purpose of an Event**

- Celebration
- Education
- Marketing
- Remembrance/Reunion
- Recreation

**Elements of an Event**

- The Venue
- The Act
- The Audience

**Categories of Events**

- Corporate
- Private
- Cultural
- Sporting
- Charity

**Corporate Events**

Used for a business to promote their companies brand and products also, to celebrate the achievements of staff members or to demonstrate expertise within a specific field.

**Types of Corporate Events**

- Conferences
- Seminars
- Meetings
- Team Building
- Trade Shows
- Business Dinners
- Golf Events
- Press Conferences
- Networking Events



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- Incentive Travel
- Opening Ceremonies
- Trade Fairs
- Shareholders Meeting
- Awarding Ceremonies
- Workshops

**Private Events**

With catering arrangements, types of menus, guest lists, booking the venue and designing the décor,

**Types of Private Events**

- Socials
- Birthday parties
- Baptism
- Wedding, Wedding receptions, Wedding anniversaries

**Sporting Events**

Athletic activity requiring skill or physical prowess, usually competitive in nature and governed by a set of rules provided by a nationally recognized sanctioning body. A sporting event typically includes the placing of competitors into a fixed order of finish, depending upon their respective athletic performance within the rules provided for that activity.

**Types of Sporting Events**

- Spectator/ participant
- Amateur/ Professional

**Cultural Events**

Events that relate to a specific culture; events that are representative of a culture

**Types of Cultural Events**

- Festivals
- Commemorations
- Religious events



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**Charity Events**

Is perfect to collect donations for a project

**Types of Charity Events**

- Sponsored runs (FUN RUNS)
- Sponsored cycling
- Sponsored skydiving
- Sponsored walks

## HISTORY OF EVENTS

**A Brief History of Event Management: Event Planning Then and Now**

Event management is relevant in making a specific time and date of an occasion be more extra special. But where does it really come from? Who came up with the idea of gathering people into one celebration and build an expound connection among them?

The earliest events and gatherings promoted peace and friendship between tribes and clans.

The first known event planner was Cleopatra. She hosted fancy over the top meetings in pursuit of lovers. Cleopatra entered one meeting by drifting down the Nile River on a boat filled with candles and perfume in order to impress Mark Anthony. Cleopatra's events would not have been possible without her servants and free labor. Communication was very limited. Messages were hand delivered and it could take weeks if not months to deliver them.

Elaborate events and parties continued with the Medieval French Royalty. Rich aristocratic women were in charge of event management. The most notable was Madame Pompadour, the mistress to King Louis XV of France and Marie Antoine. Parties were themed with costumes and popular musicians of the day.

**The Epoch of Events Management**

Industrialization provided a stronger economy and increased manufacturing and businesses.

People made more money, which meant that they could spend more on hosting events.

The expansion of transportation provided options to increase the number of events and meetings.

The introduction of mobile phones and the internet had an enormous impact on event planning. With the use of these electronics, communication can happen at any time of the day and from anywhere in the world. A person can create, find, register, and document an event by using one small portable device.



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## TYPES AND CHARACTERISTICS OF EVENTS

## TYPES OF EVENTS

### The Different Types of Events

We know there's an event for everyone – that's what makes life so exciting for event planners and attendees alike. From the number of tickets to venue size and budget allocation, every event has its own unique set of requirements. Here's an introduction to common corporate and social events to get you started.

### Types of corporate events

We hear the term 'corporate event' all the time, but what does it actually refer to? Put simply, a corporate event is an activity that's organized by a business and is intended for employees, clients, stakeholders, a charity or the public. The audience usually depends on what the aim of the event is – for example, to launch a new product or service, to celebrate the achievements of staff members or to demonstrate expertise within a specific field.

Some corporate events will be held quarterly or annually, while others might be a one-off activity – perhaps to coincide with an important announcement or in order to present an award. To help you think of creative corporate event ideas, we've explored four of the most common types of business events.

1. *Seminars*

A seminar is a type of corporate event that's organized with a target audience in mind and aims to impart highly relevant information to them. A seminar can be held at a venue, a company headquarters or even online with the right business communication tools and technology in place.

2. *Conferences*

Conferences tend to be a much more complicated event with multiple speakers and sessions spread across a number of spaces within one or more venues. With the aim of encouraging conversations and offering people a platform where they can share their expertise, conferences usually begin with a keynote session before moving to interviews, roundtables and panel discussions.

3. *Trade Shows*

Whether you are organizing or attending a trade show, this kind of corporate event is a great chance to showcase your latest product and introduce your brand to other businesses or the general public. As a result, trade shows present a great opportunity to generate sales leads. And as they focus on displaying or exhibiting products, they usually take place in large venues with space for tens, if not hundreds, of vendors.



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4. *Workshops*

While many B2B event organizers will fall into one of the three categories above, it's important to consider the value of workshops, seminars and training sessions, as they can help businesses connect both with staff and the public.

**Types of Social Events**

There are plenty of reasons to get a group of people together away from a business or workplace environment. Social events should speak to someone's personal interests and tend to revolve around eating, entertainment or both.

1. *Reunions*

From a get-together with old classmates or family members to an event that marks an important anniversary, reunions are usually highly personal occasions. Speeches, a DJ playing songs everyone used to dance to, a slideshow of old photos – essentially, the event should help people reminisce.

2. *Parties*

A great event organizer will always find an excuse to celebrate, and hosting a themed party can really help when it comes to making decisions around marketing, decorating and catering. From intimate gatherings to events with gigantic guest lists, a creative idea could be timeless – Alice in Wonderland, superheroes, a murder mystery – or align with a particular date or occasion, for example, Eurovision, Pride, Coachella.

3. *Galas*

The main aim of this kind of social event is usually to raise money for a chosen charity or non-profit organization. Encouraging attendees to give generously via an auction, raffle or competition can help boost proceeds from ticket sales.

**Corporate Events - The 10 Most Common You'll Find**

1. *Conferences*

Conferences are primarily networking events where industry professionals operating within the same sector or industry can meet one another in order to learn from one another, discuss future business opportunities and collaborations, and the like.

Conferences are, however, not just about small-talk and shared drinks.

Conferences present an opportunity for professionals to learn from and connect with one another on a specific theme or topic on a more formal level. A conference usually features or starts with a keynote address by a guest speaker, followed by smaller breakout sessions during the course of the conference.

That is to say that not all conference attendees are kept in the same place at the same time, and that multiple different lectures etc. will be run in different venues simultaneously, giving



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attendees the opportunity to prioritize their interests and learn from a diverse group of industry professionals in a short period of time by bringing them all together at the conference.

2. *Seminars*

Seminars are similar in aim to conferences in that they also provide an opportunity for companies and individuals operating in the same industry or sector to get together in order to learn from one another or to share information and network.

However, seminars are usually more formal in their educative efforts in that, one speaker typically addresses the entire group, and the entire group are always in the same place at the same time.

In other words, seminars offer attendees less choice and variety than conferences and are more focused on a singular topic.

3. *Team Building Events*

Team building events are in-house events aimed at boosting morale, improving on employee communication skills, and encouraging employees to work together efficiently.

Team building events should be fun, and should boost employee confidence and build on the company's strengths.

Corporate team-building events can be anything from solving mental puzzles at an establishment like HintHunt, to completing complex outdoor obstacle courses as a team, or working together to solve riddles on a scavenger hunt.

4. *Trade Shows/Expos*

Trade shows and expos are large-scale events that include multiple vendors or exhibitors whose area of operations fall under the umbrella industry being represented by/at the trade show.

Companies may choose to attend trade shows as exhibitors in an effort to reach potential customers, other members of the industry, or to source and connect with suppliers.

5. *Executive Retreats*

Executive retreats and incentive programs usually go hand in hand in structures in which individual performance is rewarded by extending an invitation to an executive retreat.

Executive retreats are usually held in desirable locations and at luxury resorts, and while some time is usually devoted to developing the coming term's organizational strategy, there is also ample time devoted to relaxation, exploration and excursions – this being the incentive bonus portion of the trip.

6. *Business/Corporate Dinners*

Business or Corporate dinners can be many things, and the aim will determine the location and duration of said dinner.



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If the dinner is an in-house strategy session, for example, a catered dinner in the office boardroom might be most conducive to a working dinner.

7. *Golf Event*

Many a deal has been brokered on the putting green, or over shrimp cocktail in the clubhouse dining room.

Golf and corporate culture go hand-in-hand, and the primary objective when planning to meet your staff, suppliers and/or clients on the golf course, or at the clubhouse for a spot of lunch, should remain to foster relationship growth, or do to a little relationship management or upkeep.

Ensure that you do not allow the leisure activities to lead you astray, and that, at the end of the day, the golf day serves your business strategy.

8. *Product Launches*

Product launch events can range from small in-house meetings to ensure all levels in the organizational hierarchy are kept up to date, to massive, glitzy parties geared toward building a hype surrounding an upcoming product.

Product launch events are most commonly held by businesses geared toward producing and selling products to consumers – these prospective consumers and the media being key invitees to the launch event.

9. *Shareholder/Board Meeting*

Shareholder and board meetings are an imperative part of any public or private company's communications strategy and yearly plan.

These meetings serve as an opportunity for the board to reflect on the performance of the company based on their previous strategies to date, and allow them to make decisions about necessary adjustments to these strategies.

10. *Year-end Functions*

Annual holiday parties or year-end functions are a company's opportunity to show their employees how much another year of hard work and loyal service has meant to them.

A very versatile event, year-end functions can be hosted on a shoestring budget, or can be lavish outings to luxurious restaurants, theaters or the like.

## CHARACTERISTICS OF EVENTS

### Introduction

Events as all other services have some distinct event characteristics, which make it as much a part of the marketing function as communications. For an event to be successful it requires a clear and robust concept, which is aligned with the event aims, the needs of the target market



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and other relevant stakeholders. As part of the event design process you should ask and answer the 5 W's – what, why, who, where and when?

What is it that defines a successful event? Attendees should walk away feeling they got great value for their time and monetary investment. Workshop presenters should hope to be invited back. The overall event should pay for itself so it doesn't lose money and can be put on again in future.

**Characteristics of an Event**:

*Getting PR*

One way to measure the success of your event is by how much exposure you get. The best marketing is free marketing. Did a local news report mention your event, interview one of your speakers, or tell people about something else going on during your event? What about print exposure? Were people talking about your event online? Getting PR can help you have a bigger turnout the next time, especially if you are hosting an event in the same location time and time again.

*Excellent Feedback*

The very best way to measure how successful your event was is by asking those who attended the event. Ask for feedback from attendees as well as suggestions for how to improve things. While some people do just like to complain, others will try to help you improve by pointing out what you did right and what you can do better. Always include an area on the feedback form that allows people to write a few notes. You'll be surprised at some of the fabulous ideas you get that you can try to implement next time. It is also a good idea to keep feedback anonymous. Yes, you'll get a couple of nastigrams, but you'll also get some honest, helpful feedback that way.

*Speakers Have What They Need*

A successful event is one that understands that speakers need tools to be able to give a good presentation. From overhead projectors to microphones and speakers that work, you should test these items before the big day and be on hand to fix anything that isn't working. There is nothing worse than a speaker unable to talk to the crowd gathered in her room because her microphone has screechy feedback and it is hurting everyone's ears. While some people can talk loud enough to be heard anyway, not everyone is capable of that. The speaker and the attendees will walk away feeling cheated.

*Things Were Organized*

A well-organized event tends to be a successful one. If you have assigned tasks to everyone, planned ahead, and have contingencies in place for emergencies, then things will likely run much more smoothly than if you try to host an event by the seat of your pants. One big area that should be well organized is registration. People should move quickly and smoothly through this process as it is the first impression people have of your event.



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*The Food Was Good*

Let's face it – we are a food driven society. When we meet friends, it is often over dinner. When the family gathers, there is a big meal. People do look forward to meal times at a conference or event, so make sure they are amazing. Sample the caterer's food before hiring him or her, for example. Go above and beyond. Offer three meals, snacks and a dessert bar. You want people to walk away thinking they got their money's worth for the conference fee. While you might not be able to afford to feed them filet mignon, you can definitely feed them one of the tastiest chicken dishes they've ever tried.

*Unexpected Occurrences Were Handled Competently*

At any event, something can and probably will go wrong at some point. The key to a successful event is in how these situations are handled. For example, a storm knocks the power out. Do you have a backup plan for that? Perhaps you can host a "share your success stories by candlelight" event in the main dining room and break everyone into groups with a speaker or presenter at each table. This can turn what would be a catastrophe into a memorable event. The key is to think through things that might go wrong and come up with a plan to deal with trouble ahead of time.

*Work Was Delegated*

One person can't do everything to pull off a successful event. You should surround yourself with people who are smart in different areas and utilize their knowledge and skills to pull off an amazing event. Is someone amazing at planning centerpieces or planning a party? Put that person in charge of the welcome gala. Is someone else great at lining up celebrity speakers because of her connections in the industry? Put her in charge of finding great speakers and making those speakers feel welcome at the event.

## FIELD OF SPECIALIZATION

### What is Field?

According to Merriam Webster, it is a particular branch of study or sphere of activity or interest and its synonyms are area and discipline.

### What is Specialization?

It is the process of concentrating on and becoming expert in a particular subject or skill. Also, a particular area which someone concentrates on or is an expert in.
In events management there are four functions of special events:

- Leisure
- Cultural
- Organizational
- Personal



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These are the fields specialization of events management:

- Civic Events
- Expositions
- Hallmark Events
- Incentive Travel
- Retail Events
- Social-Life Cycle Events
- Tourism
- Conventions
- Fairs And Festivals
- Hospitality
- Meetings And Conferences
- Reunion
- Sports Events

In this report, it will just discuss five of the field specialization because it was tackled under the types of the events.

**What is a civic event?**

A civic event involves the Chairman of the Council and may also be jointly led by the Elected Mayor. The Chairman and Mayor lead the events on behalf of the council and residents. It can be a public event, such as a Remembrance Sunday ceremony, or for invited guests, for example the Auditor Awards. The events are usually formal occasions which can show support for local businesses, charities, community groups or schools.

**What is an Expo?**

Expos are global events dedicated to finding solutions to fundamental challenges facing humanity by offering a journey inside a chosen theme through engaging and immersive activities. Organized and facilitated by governments and bringing together countries and international organizations (Official Participants), these major public events are unrivalled in their ability to gather millions of visitors, create new dynamics and catalyze change in their host cities.

**What is Hallmark Event?**

Hallmark events are major, large-scale events focused on a distinct theme, in general with a non-exclusively local catchment area, typically giving the host community an advantage in the tourism market and possessing high economic importance.

**What is an Incentive Travel?**

Event management of incentive travel events that motivate your employees and customers. Incentive travel is an event category that targets to motivate both key personnel and customers. Imagine sunning yourself on a beach in Jamaica or snow skiing in the Alps. Then imagine that



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your trip is completely free. Many companies use incentive travel as a marketing tool. These trips can range from a week in an exotic location to a weekend getaway in nearby resort.

Most of the time all of the expenses are paid by the company including food, hotel, airfare (or in some cases a rental car).

**What is a Retail Event?**

A promotional event is an occasion that draws attention to a particular product or products, such as a price decrease, or the chance to win a prize when buying the product.
Promotional events for our retail clients are held at some of the top conference and event venues and include tours and catering.
The in-store fashion show was the most successful promotional event that the store ran last year.

A promotional event is an occasion that draws attention to a particular product or products, such as a price decrease, or the chance to win a prize when buying the product.

**Evaluation/Assessment**

**Module 1**

**Identification:**

_____1. Something that happens or is regarded as happening; an occurrence, especially one of some importance.
_____2. The process of analyzing, planning, marketing, producing and evaluating an event.
_____3. It is the process of concentrating on and becoming expert in a particular subject or skill.
_____4. A type of corporate event that's organized with a target audience in mind and aims to impart highly relevant information to them.
_____5. The main aim of this kind of social event is usually to raise money for a chosen charity or non-profit organization.
_____6. An opportunity for professionals to learn from and connect with one another on a specific theme or topic on a more formal level.
_____7. In-house events aimed at boosting morale, improving on employee communication skills, and encouraging.
_____8. A particular branch of study or sphere of activity or interest and its synonyms are area and discipline.
_____9. This kind of corporate event is a great chance to showcase your latest product and introduce your brand to other businesses or the general public.
_____10. Tend to be a much more complicated event with multiple speakers and sessions spread across a number of spaces within one or more venues.

**Enumeration:**

Elements of an event (3 points)
Categories of events (5 points)
Types of private events (2 points)



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## Module 2

## The Events Manager

Objectives

At the end of this module, students are expected to:

1. Understand the events manager's role;
2. Identify the job description of an event manager;
3. Express on their own words the task and responsibilities of an event manager.

Module 2 covers the following topics:

A. The Events Manager's Role;
   1. Job Description
   2. Task and Responsibilities



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## THE EVENTS MANAGER

## JOB DESCRIPTION

### What is Job Description?

A job description is a statement that outlines the specifics of a particular job or position with a company. It goes into detail about the responsibilities and conditions of the job

### Why  Job Description is Important?

A job description is an essential part of the job application process as, with the right information, it should help applicants to determine whether the role is in line with their skill set and whether it is a job they actually want to do.

### What is the main uses of Job Description?

- To provide the employee with the expectations that are required of them in the role
- To provide enough detail to help the candidate assess if they are suitable for the position
- To support the recruitment team during the selection process
- To provide the employee with the expectations that are required of them in the role
- To provide enough detail to help the candidate assess if they are suitable for the position
- To support the recruitment team during the selection process

## TASK AND RESPONSIBILITIES

### Event Manager

- Is a person of vision, energy and commitment in a position of responsibility and authority. May also be involved in more than just the planning and execution of the event, but also brand building, marketing and communication strategy.

### Task and Responsibilities Of An Event Manager

*1. Personality*

An event manager should be able to present a calm, friendly, and courteous manner at all times. The five essential characteristics of successful event managers can be listed as:

- Detail Oriented
- Organized
- Full of energy, both physical and emotional
- Nurturing
- Flexible



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*2. Motivation*

The job of a event manager requires hard work and service orientation; it is not a good position for a glory seeker.

*3. Safety Meetings and inspections*

During the risk assessment meeting event manager needs to elicit all possible health or safety hazards associated with the goods, services and personnel to be used to produce the events.

*4. Sanitation and Hygiene*

Cleanliness and hygienic conditions are imperative for many reasons, including health and safety from injuries or illness, but also for the comfort and the welfare of the event audience, participants, and the welfare of the event audience, participants, and personnel.

*5. Preparing an event record*

The event records mainly include:

- Timeline schedules
- Initial proposal
- Contacts
- Committees
- Correspondence
- Budget
- Site
- Marketing and promotion
- Promotional Materials
- Registration
- Theme and Program
- Audiovisual

*6. On the day of the event*

Ideally, a manager will have the delegated well enough to be able to do nothing but to transverse the site, checking upon people and activities and chatting with guests to find out how the event is perceived.

*7. Keeping the events on track*

- Select volunteers; form committees
- Decide goals and themes
- Research audience
- Create event names and logo
- Chose evaluation methods
- Outline budget
- Contact potential sponsors
- Visit and select sites
- Diagram sites



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- Make signs
- Plan publicity campaigns
- Audition and select performers
- Schedule rehearsals
- Draft menu
- Negotiate with caterers
- Chose serving style
- Shop for supplies
- Prepare food
- The big day
- Clean up and close
- Meet for evaluations
- Send thank you
- Write and file reports

8. *Selecting an event*
   - Purpose
   - Audience
   - Merchandise
   - Athletic endeavors
   - Education
   - Games

9. *Choosing a theme*

10. *Goal Settings for special events and conference*

**Evaluation/Assessment**

**Module 2**

**Essay**

In your own words, what are the tasks and responsibilities of an event manager?



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## Module 3

## The Market Demand for Event

Objectives

At the end of this module, students are expected to:

1. Understand and define the market for events;
2. Identify the events stakeholders;
3. Describe the structure of demand for event.

Module 3 covers the following topics:

A. The Market for Events
    1. Size and scope of the events market
    2. The structure of demand for event
B. Determinants and Motivation
C. The Events Stakeholders



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## THE MARKET DEMAND FOR EVENTS

## SIZE AND SCOPE OF THE EVENTS MARKET

### Size and Scope of the Events Market

Events on Demand is founded on creativity, imagination, and a passion to put together the best and most memorable event possible for our clients. We are a full-service events management agency catering to a wide range of clients. We have done everything from formal corporate functions, impactful commercial events, and intimate private affairs. What we have to offer our clients is our years of experience in events planning and management, our extensive network of tried and tested suppliers, and the enthusiasm for what we do. We pride ourselves in our ability to customize each event— even the most minute detail— to our clients' needs. Organized and customized, we provide a lasting impression for every occasion.

*According to Global Opportunity Analysis and Industry Forecast, 2019–2026*

### Events Industry by Type

Music Concert, Festivals, Sports, Exhibitions & Conferences, Corporate Events & Seminars, and Others. Revenue Source (Ticket Sale, Sponsorship, and Others). Organizer (Corporate, Sports, Education, Entertainment, and Others), and Age Group (Below 20 years, 21–40 years, and 41 years & Above) According to Global Opportunity Analysis and Industry.

### Market Size in Events

The most popular events include conference & exhibition, corporate events & seminars, promotion & fundraising, music & art performance, sports, festival, trade shows, and product launch. The key stakeholders within the events market are corporate organizations, public organizations & NGOs, and similar others.

### Events Industry

The initial stage of a major event involves understanding the audience and their behavior that excites and emotionally engages them.

The final stage involves conducting events, such as music concerts, sports, exhibitions & conferences, seminars, and others, appropriately. It has been witnessed that events such as music concerts attract majority of the population, especially the youth and middle-aged individuals, which boost the growth of the events industry size. Although the album sales have drastically reduced, shift in preference of artists and performers toward touring and conducting music concerts at various places across the world has further driven the events industry growth.

In addition, rock and pop music dominates most of the markets, globally while the U.S. population prefers rap and hip-hop. Thus, increase in such music concerts and events offers valuable opportunities for promoters and brands to align themselves with people attending concerts.



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Furthermore, sports events have become more commercialized in the recent years. Thus, sports serve as a significant marketing advertisement opportunity for event management companies, which sponsor these events.

**Global Events Industry By Type**

In 2018, based on type, the corporate events & seminars segment accounted for the maximum events industry share, owing to rise in number of corporate companies coupled with frequent seminars and events conducted by them. In addition, seminars and events involve interaction between speaker and audience, thereby increasing the number of attendees.

**Global Events Industry by Revenue Source**

By revenue source, the sponsorship category garnered the highest share in 2018, due to unlimited opportunities the organizers find to broaden their competitive advantage. Moreover, sponsoring an event increases reach among potential buyers and customers, which drives the sales.

On the basis of age group, the 21-40 years' segment contributed to the maximum share in 2018, owing to rise in interest toward entrepreneur & business seminars along with music concerts and festive gatherings.

Region wise, Europe accounted for the highest revenue in 2018, as the region has been extremely successful in winning conferences of international associations with over half of the top cities and countries selected as destinations for international association conferences.

**Understanding the Scope of the Event**

Needs Assessment

*Purpose statement of the event*

Why we need this event?

*Identify the Stakeholder*

Who has a direct interest in the outcome of the event?

Stakeholder categories could be: Sponsoring organizations, Community Supporter, Industry and Academia Leaders, Participants

*Sponsor Expectations*

What the Sponsor or sponsoring organization expects to achieve through this event?

Factors and Impacts - Location, venue, date, projected participant numbers, speaker costs



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## THE STRUCTURE OF DEMAND FOR EVENT

### Market Demand For Events

According to Minneapolis-based CWT Meetings and Events, demand for events and meetings will grow between 5% and 10%.

Event Management deals with all activities from the origination to execution of an occasion like conferences, sporting events, stage shows, meetings, etc.

### Classification of Events:

*Corporate Events* - a corporate event is any form of event, hospitality or social activity which is organized or funded by a business entity.

*Social Events* - a social event involving a public performance or entertainment. affair, function, occasion, social function, social occasion. a vaguely specified social event. competition, contest. an occasion on which a winner is selected from among two or more contestants.

## DETERMINANTS AND MOTIVATION

### Determinants of Market Demand Definition:

Market The Demand is defined as the sum of individual demands for a product per unit of time, at a given price. Simply, the total quantity of a commodity demanded by all the buyers/individuals at a given price, other things remaining same is called the market demand.

*There are several factors that determine the demand for a product. These are:*

1. **Price of the Product**

The price of a product is the most important determinant of market demand in the long-run and the only determinant in the short-run. As per the law of demand, the price of a product and its quantity demanded are inversely related, i.e. the quantity demanded increases when the price falls and decreases when the price rises, other things remaining the same. Here, other things imply that the income of the consumer, the price of the substitute and complementary goods, tastes and preferences and the number of consumers, all remains constant. The price-demand relationship has more significance in the oligopolistic market structure in which the result of a price war among the firm and its rival decides the level of success of the firm.

2. **Price of the Related Goods**

The market demand for a commodity is also affected by the changes in the price of the related goods. The related goods may be the substitute or complementary goods. Two commodities are said to be a substitute for one another if they satisfy the same want of an individual and the change in the price of one commodity affects the demand for another in the same direction. Such as, tea and coffee, Maggi and Yippie, Pepsi and Coca-Cola are close substitutes for each other. The increase in the price of either commodity the demand for the other also increases



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and vice-versa. A commodity is said to be a complement for another if the use of two goods goes together such that their demand changes (increases or decreases) simultaneously.

For example, bread and butter, car and petrol, mattress and cot, etc. are complementary goods. The increase in the price of either commodity the demand for another decreases and vice-versa.

### 3. Consumer's Income

The income is the basic determinant of the quantity demanded of a product as it decides the purchasing power of the consumers. Thus, people with higher disposable income spend a larger amount of income on consumer goods and services as compared to those with lower disposable income.

Consumer goods and services can be grouped under four categories: essential goods, inferior goods, normal goods, and prestige or luxury goods.

### 4. Consumers' tastes and preferences

Consumer's Tastes and preferences play a vital role in determining a demand for a product. Tastes and preferences often depend on the lifestyle, culture, social customs, hobbies, age and sex of the consumers and the religious sentiments attached to a commodity. The change in any of these factors results in the change in the consumer's tastes and preferences, thereby resulting in either increase or decrease in the demand for a product.

### 5. Advertisement Expenditure

Advertisement is done to promote sales of a product. It helps in stimulating demand for a product in four ways; by informing the prospective consumers about the availability of a product, by showing its superiority over the competitor's brand, by influencing the consumer's choice against the rival product and by setting new fashion and changing tastes of the consumers. The effect of advertisement is said to be fruitful if it leads to the upward shift in the demand curve, i.e. the demand increases with the increase in the advertisement expenditure, other things remaining constant.

### 6. Consumers' Expectations

In the short run, the consumer's expectation with respect to the income, future prices of the product and its supply position plays a vital role in determining the demand for a commodity. If the consumer expects a high rise in the price of the commodity, shall purchase it today at a high current price so as to avoid the pinch of the high price in the future. On the contrary, if the prices are expected to fall in the future the consumer will postpone their purchase with a view to avail benefits of lower prices in the future, especially in case of nonessential goods.

### 7. Demonstration Effect

Often, the new commodities or new models of an existing product are bought by the rich people. Some people buy goods due to their genuine need for them or have excess purchasing power. While some others do so because they want to exhibit their affluence. Once the commodity is in very much fashion, many households buy them not because they have a genuine need for them but their neighbors have purchased it. Thus, the purchase made by such people arises out of feelings as jealousy, equality in society, competition, social inferiority, status consciousness.



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The purchases made on the account of these factors results in the demonstration effect, also called as Bandwagon Effect.

**8. Consumer-Credit Facility**

The availability of credit to the consumer also determines the demand for a product. The credit extended by sellers, banks, friends, relatives or from other sources induces a consumer to buy more than what would have not been possible in the absence of the credit. Thus, the consumers with more borrowing capacity consumes more than the ones who borrow less.

**9. Population of the Country**

The population of the country also determines the total domestic demand for a product of mass consumption. For a given level of per capita income, tastes and preferences, price, income, etc., the larger the size of the population the larger the demand for a product and vice-versa.

**10 Distribution of National Income**

The national income is one of the basic determinants of the market demand for a product, such as the higher the national income, the higher the demand for all the normal goods. Apart from its level, the distribution pattern of the national income also determines the overall demand for a product.

## THE EVENTS STAKEHOLDERS

Event planning is the procedure of handling a project of this kind through arranging such as a conference, a convention, a trade fair, a team building activity, a hospitality gathering or an exhibition. The planning process includes drawing a realistic budget, drawing a timetable of every activity, choosing and reserving the event venues, obtaining permits where necessary and needed. Planning and making arrangements for food and drinks, harmonizing transportation of people and items, designing a suitable theme planning for every activity. There is also need to chose and invite keynote speakers and promoters in good time and ensuring that the venue is well facilitated and equipped with a good public address system if planning for big audiences. Risk management needs to be accounted for while having some contingency plans in cases of eventualities. Event Planning consists of coordinating every little detail of planning from the speakers and meeting location to arranging for printed materials and advertising the event itself through chosen media.

Event planning begins with determining the objective that the sponsoring organization wants to achieve. Planners strategically choose speakers, entertainment teams and activities, content, and arrange the program to present the organization’s information in the most effective way. Meeting planners are responsible for selecting meeting venues, likely guests and how to get them to the meeting. (Institute of Event management, 2012)



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**Objectives of an Event Planning**

Every event planning or product launch should have its goals and objectives to form the vision because without them, your event will not have any defined vision. However, an event can have one or many goals and multiple objectives supporting the goals which are necessary to the success of the event. There should be more than one purpose for an event planning, for example this event is about launching a new product by raising sales target and also promoting the brand.

The main purpose of this product launch is to put across our communication strategies either by using the push or pull strategy. The main focus strategy which will be more vital with this product is the pull strategy, by focusing more on the direct consumers than business to business consumers which is also referred to as the push strategy.

**What Are Stakeholders?**

Stakeholders can be internal or external. Internal stakeholders are people whose interest in a company comes through a direct relationship, such as employment, ownership or investment. External stakeholders are those people who do not directly work with a company but are affected in some way by the actions and outcomes of said business. Suppliers, creditors and public groups are all considered external stakeholders.

**Who Are Stakeholders?**

Stakeholders will vary on each project that you undertake but for an event they could be: event organizers employees and volunteers service and contract providers (e.g. catering, merchandise, amusement structures and equipment) emergency services (e.g. SA Ambulance Service, SA Police, Metropolitan Fire Service, State Emergency Service, Country Fire Service, etc.) local council security services transport services (e.g. Department of Transport, Energy and Infrastructure (DTEI)) regulators (e.g. Safe Work SA, Office of the Technical Regulator (OTR)) Media members of the public who attend the event

*Internal Stakeholders*

Groups within a business or people who work directly within the business, such as employees, owners, and investors.

*External Stakeholders*

Groups outside a business or people who are not directly working within the business but are affected in some way from the decisions of the business, such as customers, suppliers, creditors, community, trade unions, and the government.



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*Primary Stakeholders*

The people and groups most affected by the outcome of the project and the outcome may be positive or negative. In research analysis, they are often divided into groups based upon certain demographic factors such as gender, socioeconomic status, age and ethnicity.

*Secondary Stakeholders*

Individuals or groups not directly affected by the outcome of the project, but still having an interest in it. They often help provide aid to the primary stakeholders. These groups may include government agencies, money lending institutions or monitoring agencies.

**Evaluation/Assessment**

**Module 3**

**Define the following:**

1. Corporate events -
2. Social events -
3. Market Demand –
4. Event planning-
5. Internal stakeholders-
6. External stakeholders-
7. Primary stakeholders-
8. Secondary stakeholders-
9. Stakeholders-
10. DTEI -

**Essay:**

Discuss the factors that determine the demand for a product.



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## Module 4

## Event Management Planning

Objectives

At the end of this module, students are expected to:

1. Identify the event planning;
2. Appreciate the value of contingency planning;
3. Draft an event vision.

Module 4 covers the following topics:

A. Event Planning: Envision
   1. Creating the event vision
   2. Setting event objectives
   3. Drafting the event vision
   4. The event concept, format, experience, invitation
   5. The venue, atmosphere, event site plan, arrangement of space
   6. Setting-up the meeting room
   7. Planning for sensory cues and treats

B. Contingency Planning
   1. Safety and security
   2. Problem analysis and contingency planning
   3. Crisis management plan



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**EVENT MANAGEMENT PLANNING**

**EVENT PLANNING: ENVISION**

**CREATING THE EVENT VISION**

**Steps and Definition of How to Create Event Vision**

**What is Event?**

An event can be described as a public assembly for the purpose of celebration, education, marketing or reunion. Events can be classified on the basis of their size, type and context.

An Event is an investment of time that of the organizers, the audience and other stakeholders and money or a similar resource provided by these same people.

Also to be more efficiently and effectively successful the event must have an organizer and the planner, the person behind of a successful event is the Event Manager they are visionaries and not illusional or delusional sort, but persons who have vivid, distinct and detailed vision of some future happening.

**Questions that will Fulfill the Information to Create an Event Vision:**

*Ask About the Past*

Ask what would delight the expected attendees. Aim for the events that serve a need or a desire of a particular group of people. They are the ones that should be pleased, and therefore, their needs must be understood and satisfied - exceedingly, to the highest degree possible.

Knowing why, who, what, how, where and when will help you determine where it would be best to have the event - that is, if venue has not yet been decided at this point. Venue decisions should always consider the purpose of the vent, people involved in the event, their expectations, and the schedule of the event.

**1.** **"WHY?"** - Why must this event be held? This will define the purpose of the unique happening that is about to happen. Knowing the purpose helps the event manager create the vision that will realize the mission, and to put together the elements necessary to make the vision reality.

**2.** **“WHAT?”** - Ask what would delight the expected attendees. Aim for the events that serve a need or a desire of a particular group of people. They are the ones that should be pleased, and therefore, their needs must be understood and satisfied exceedingly to the highest degree possible.



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**3.** **"WHEN?"** - if the client has already decided on the date and time for the event then use this as a basis for how much time do you have to plan and prepare for the event. Event elements vary depending on the complexity of the event and what must achieve.

**4.** **"WHERE?"** - Knowing why who what and when will help you determine where would be the best to have the event and that is Venue. Venue decisions should always consider the purpose of the event, people involved in the event, their expectations and the schedule of the event.

**5.** **"HOW?"** - Check on how many participants are expected or are desired. This information will help the magnitude of work involved and may also provide a basis for budget estimate.

**6.** **"WHO?"** - Know who will be in the audience pr who will be participating in the event. At this stage in the planning process. the type of audience or participants expected to attend may still be undetermined.

## SETTING EVENT OBJECTIVE

### Setting an Event Objective

Before you start planning any kind of event, the first thing to do is define your event goals and objectives. Many planners dive right into planning without even considering this crucial bit of information. Setting event goals and objectives will actually make planning your event much easier.

Having a clear, concise, and concrete set of aims and objectives for your event in terms of what it is to achieve is critical for a host of reasons. It is very essential that the aims and objectives of your event are defined and agreed at the outset, although they may also be developed and refined as the project progresses.

Aims are related to the overall intent, strategic direction and purpose of your event (i.e. the primary motivations). Objectives are essentially aims broken down into specific targets, to facilitate event delivery and evaluation.

### Setting Event Objectives

Once the overall aims of the event have been established you can then move onto setting objectives. These should be set in relation to the different areas of the event (e.g. financial objectives, marketing objectives, participation, etc.). Objectives are important as they provide benchmarks and targets to aim for and performance indicators, which facilitate monitoring and measures for feedback and evaluation.



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*To enable this, objectives should conform to the SMART acronym:*

- **Specific** to areas of the event.
- **Measurable** quantitatively (i.e. through numbers).
- **Agreed** / **achievable** by organizers and those assigned the tasks.
- **Relevant** to the overall aims of the event.
- **Timed** within the event schedule.

An event should be a means to an end, rather than an end in itself – and different events are put on for different reasons. It's clearly important, therefore, that whenever organizers or other interested parties are looking to measure the impact of an event, they do so in relation to the original objectives of that event.

Organizers should be clear about their objectives at the very earliest stages of planning and/or bidding for an event. By the same token, there is little point in setting objectives if, in doing so, there is no accompanying commitment to measure those objectives. Objectives must therefore be measurable: organizers should have a clear sense of how they would go about evaluating the intended impact of their event; what information they would need in order for the evaluation to be made; and how costly and time-intensive it might be for them, or an outside contractor, to actually carry out that evaluation.

In summary, any impact evaluation exercise should be underpinned by a statement of the strategic objectives that the organizers of an event intend to achieve or make a contribution towards, plus details of the specific resources being invested in order to deliver those objectives.

## DRAFTING THE EVENT VISION

### Event Vision

In order to create an event designed to fulfil 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.

An event vision is an idealized picture of the event outcome and it expresses the event's reason for existence. It outlines what an organization would like to ultimately achieve and gives purpose to the existence of the organization. A good vision statement should be short, simple, specific to your business, leave nothing open to interpretation. It should also have some ambition.

### Drafting the Event Vision

In order to create an organized event vision, it must start by considering and understanding the event to be executed, the purpose of it, the persons involved, the timing and the setting. There will be an endless set of questions so we must really be prepared for it. Before getting excited at the new prospect, let's get organized.



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*You should know better and be clear on the following questions such as:*

*WHY?*

Why must this event be held?
Why would audience want to participate in this event?

*WHO?*

Who are the expected to attend the event?
Who would want to come to the event?

*WHAT?*

What will delight the audience?
What are the expectations of the persons involved?

*WHEN?*

When will the event be held?
When is the best time to hold this event?

*WHERE?*

Where will the event be held?
Where will be the attendees coming from?

*HOW?*

How many attendees are expected?
How will the budget be set for this event?

*But it should be clear that you know:*

Why must the event be held? -**THE PURPOSE**

What must the event achieve, or what are the results expected? **-THE OBJECTIVES**

Who are the people whose needs you must satisfy? -**THE AUDIENCE**

On what budget will you be operating? -**THE BUDGET**

How success will be measured? -**THE MEASURES EVALUATION**



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*Figure 1. The event vision basis*

Draft the event vision based on the following:

**THE PURPOSE**

Write a brief background or a statement on the purpose of the event. Many events may have many different purposes. Some examples of the event purposes are competitive or non-competitive sport and recreation event, promotional events, conferences, fundraising events and even personal events.

**THE OBJECTIVES**

List the objectives of the event. Include how will the audience feel, what will the attendees do as a result of coming in the event. Financial or revenue objectives might also be included.

**THE AUDIENCE**

Describe the target audience. Describe who will be the target spectators or the participants of your event. It can be the young ones, young adults, adults and the older ones.

**THE BUDGET**

State the initial estimated cost of the event or the budget remarked for it. Money dictates what kind of event you can have, so you have to be careful in terms of financial estimations and costs. In the planning stages, the budget may be based on:

- Budget of previous event or similar events
- General economic forecast – you are making predictions about the economy. Examples are the GDP or Gross Domestic Product, the inflation rate of the locality, unemployment rate of the fiscal deficit.



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- Marketing projections and estimates – this is the component of marketing analysis that provides the event manager/holder the anticipated figures and calculations based upon market researches. It may include projections for a product type, company, sector, industry, or overall population.
- Expected return on investment- it is the profit or loss an investor anticipates on an investment. Expected return on investment may also measure the performance of the event if it was efficient or not.
- Type of financing used for the event – financing the event has different type. It can be through government grants, sponsorship. It can also be through merchandising sales where there's a production of t-shirts, caps and other merch or other form of clothing with trademarks/ design of the event.
- What the host can afford – you have to stick to your budget and focus only on what your money can afford. You can't force to make a majestic event when you are short of funds.

**THE MEASURES**

Describe how the objectives will be checked and measured. In this part, you are being evaluated by what you have done in your event. You'll have to measure how successful you are by your audience and how your objectives have thrived.

## THE EVENT CONCEPT, FORMAT, EXPERIENCE, INVITATION

### Concepts

Defined as abstract ideas or general notions that occur in the mind, in speech, or in thought.

### 3 Steps to a Stand-Out Event Concept

Step 1: *Start with your audience*

It goes without saying that different themes appeal to different people. The concept that worked perfectly for a craft brewery crowd might be all wrong for your fundraising gala. Understanding your audience is key to designing an event attendees love

Ask yourself:

- What did your previous attendees like most (and least) about your events?
- Who is your target demographic? (Hint: start by identifying your most valuable attendees.)
- What interests do your potential attendees share? Why do they attend events like yours?
- Should your event be child-friendly, or 21+? Is this a night out, or a day with the family?



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Step 2: *Build your event concept around your main attraction*

Your event concept should be built around two things: your audience and your main attraction.

Ask yourself:

- What would enhance the main attraction at my event?
- Is there an era or style that I could reference?
- What kind of food or drink would fit the theme?
- How can I involve sponsors in this work?

Step 3: *Heighten your event concept with a unique venue*

Once you have your event concept built out, choose a venue (traditional or otherwise) that reflects your selection.

Here are some examples to get the wheels turning:

- Warehouses and studies
- Museums — both highbrow and low
- Botanical gardens
- Historical theaters
- Airplane hangars

**Event Invitation**

An event invitation email is an email that is sent to the subscribers to announce an upcoming event like a webinar, conference, presentation, etc., and convince people that it is worth visiting.

What to include?

- Attendee invited
- Day, Date and Time of the event
- Name of the location and the address.
- Dress Code
- Theme

**The Event Planning Template Step-by-Step**

Step 1: *Set up the Template*

Step 2: *Determine Your Event Timeline*

How much time do you have to plan the event? More time is generally better, although you may be asked to plan an event in as little as 2 weeks!



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Step 3: *Fill In Your Event Details*

Once you have selected the best template version for your event, it's time to fill in the Event details:

- Event Title
- Date of the Event
- Time of the Event
- Location of the Event
- The Event Organizer and Contact No. (i.e. you or a colleague)

Step 4: *Specify Tasks: What, When, Who*

An event planning template is a specialized project management tool. It's designed so you can clearly identify:

- Groups of tasks that need to be undertaken within a similar timeframe. For example, the 90-Day Timeframe is divided into tasks that need to occur 60-90 days prior, 30-60 days prior and 14-30 days prior.
- Every specific task that needs to occur. For instance: define the purpose of the event, prepare a guest list, book a venue, book an entertainer, identify AV requirements etc.
- Who is responsible for delivering each task.
- Deadline for each task.
- Whether or not the task has been completed.

Step 5: *Using the Template*

**Category**

There are countless individual tasks to be performed in the lead up to an event. To help keep you organized and on track, tasks have been categorized as:

- Venue
- Catering
- Run Sheet
- MC/Speaker
- Entertainment
- AV/ Lighting/ Staging
- Promotion/ Signage
- Set Up
- Evaluation



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## THE VENUE, ATMOSPHERE, EVENT SITE PLAN, ARRANGEMENT OF SPACE

### Event Planning

It involves the coordination of every detail of events such as meetings, conventions, trade shows, ceremony, retreats, or parties. An event plan is a key document that outlines all of the elements of an event.

Event planning includes but it not limited to budgeting, establishing timelines, selecting event location, arranging for equipment, acquiring the appropriate permits, planning menus, transportation, developing a theme, hiring entertainment, selecting speakers, managing risks, and developing contingency plans. The event plan is essentially the one-stop shop to manage all of the moving parts involved in the event. In some cases, it may prove beneficial to share portions of the event plan with certain vendors in order to ensure goals and expectations are in alignment.

It is very important that while planning your event you take great consideration into planning to achieve the perfect atmosphere. An atmosphere that would enable your guests to relax, interact with each other and enjoy the event's proceedings. There is no single action you can take to achieve this but rather, it takes a combination of factors, skillfully coordinated and managed together to ensure your event is everything you want it to be.

### Venue

A venue is the place where an event or meeting is happening. If you're going to see the best band ever, you should get to the venue early to get a good seat. It derived from the Latin for "come" (venire), and it's a place people come to.

### What to Consider when Searching for a Venue

*Location*

If you want to reduce the chance for your attendees to be late, provide them with a mobile event app, which is essentially a standard these days.

*Parking*

Does the venue have a parking lot or valet parking? A venue with a parking lot is what dreams are made of. If that's not the case, there are parking lots nearby which attendees can access and use. If there is no parking available, there are few alternatives.

*Capacity and Minimums*

- What's the capacity?
- What are the F&B Minimums?



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*Services and Amenities*

- Does the venue have a kitchen and can it provide catering to your event?
- Does it have tables, chairs and linens you can use?
- Does it have a setup/clean up crew?

## ATMOSPHERE

One of the most important parts of a successful event is the atmosphere! A great atmosphere allows your guests the ability to relax, interact with other guests and enjoy the festivities of the events.

### What to Consider Creating the Perfect Atmosphere at Your Event

*Choose the Right Location*

It is extremely important to choose the right venue and location for your event. Having the right venue for the type of event you are holding will enhance the atmosphere in itself. Ensure your venue is conveniently located close to all major transport links (airports, motorways, tube, trains and buses) and has sufficient parking space for the projected guest/delegate numbers.

*Greet Your Guests with a Friendly Welcome*

First impressions count, so provide your guests/delegates with a positive one. Your hosts /hostesses should welcome every guest/delegate with a warm greeting and smile and be knowledgeable about the venue facilities.

*Set the Mood with Lighting*

Setting an atmosphere and creating a dramatic first impression is why mood lighting is so vital to any event. Get the lighting (and sound) right and you are well on your way to creating a dynamic event.

Talk to the professionals about what you want to achieve and let them guide you on the latest technology or tricks of the trade to get this all-important aspect right.

*Create Ambiance with Music*

Choose a style or genre of music that suits all tastes. Calm classical music is a good choice, or some relaxed jazz. Leave the techno music for the nightclubs, unless you are holding a DJ event of course!



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*Choose a Great Master of Ceremonies*

The host can make or break the occasion, so choose who will take control of the audience and manage the proceedings in a professional manner. The host must set the atmosphere of the event, striking the right tone according to the subject and objective of the event.

*Dressing the Tables*

Your guests/delegates will be seated for most of an event, so make sure they are comfortable and have water throughout the proceedings. For the perfect tables and chairs arrangement you can contact us.

*Say Thank You and Farewell*

You've put a lot of time and effort into creating the perfect atmosphere at your event. Now that it has come to an end you must endeavor to give each and every guest/delegate a hearty thank you and farewell. It is a nice gesture to have the same person who greeted the guests give a warm goodbye as it creates a pleasant sense of continuity.

**Site Plan**

It usually shows a building footprint.

It is a graphic representation of the arrangement of buildings, parking, drives, landscaping and any other structure that is part of a development project.

**Best Practices When Creating an Event Plan**

*Determine the objective*

Determine what the client or sponsoring organization hopes to achieve with the event.

*Establish a budget.*

A budget should include true estimates of key elements of the event. Provide an outline of the budget in the event plan. Include travel and accommodation costs for the site scouting team, speakers, presenters, and special guests from out of town.

*Organize a team*

A successful event plan requires a concerted team effort. Among your event project team you may choose to identify an event manager or event chair as well as chairpersons for subcommittees. Subcommittees may include venue selection, speakers, entertainment, sponsors, volunteer management, and marketing.

*Set a date*

If it's a reoccurring event, the date may already be established. If this is a new event, there are a few things to consider before finalizing the date:



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- Allow enough time to prepare. Larger events may require four to six months, perhaps even longer, to execute an event plan. Obviously, the selection of the lead time is dependent on the size, nature, and timing of your event.
- Be mindful of national and religious holidays.
- Check availability of key participants such as honored or VIP guests, speakers, presenters, entertainment, etc.

Create a plan. The event plan must encompass all aspects of the event, including:

- Venue, logistics, catering
- Presenters, key note speakers
- Entertainment and activities
- Marketing efforts
- Registration logistics
- Sponsorship or partnership management
- Volunteer management

## SETTING-UP THE MEETING ROOM

### How to Set Up the Meeting Room

Having an established meeting room can make positive impressions especially on the meeting attendees. A more professional meeting room setup helps to eliminate non-work related distractions and boost productivity. It can also encourage the executive team and other employees to be more professional while influencing others to take them seriously. To have a more comfortable yet professional meeting room there are some specific things and necessities that are needed.

*The Main Necessities Needed In The Conference Rooms:*

### Whiteboard with pens

These are needed to make some visual aids and take notes of the highlights of the meeting discussion. It also helps to explain the topic in more details.

### Chairs and Tables

To have a more comfortable meeting place, it is nice to have the right chairs and table where the attendees will be more comfortable. Also, we should consider the place if the chairs and tables will fit the room and if it won't be narrowed. Having a comfortable chairs, table and wide space can help the meeting attendees focus on the discussion.



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**Projector and Viewport**

Before starting the meeting, it is required to check the technologies or gadgets that we will use. We should always check if the projector and other technologies are working and functioning well. Always check if we have the right equipment before starting the meeting.

**Cable and Cords**

We should have almost all the types of cable and cords or the specific cable and cords that we will be needing in the meeting. We can stock those cable and cords beforehand or double check the cable and cords that we brought before going to the room. Also, we should check if the cords are functioning well and is compatible with the other gadgets and technologies ahead of time so we can avoid having connectivity issues.

**Functioning A/V Equipment**

If the presentation requires an audio, we will need an equipment for that. We should always check if the speaker is functioning before the time of the meeting.

**Audio or Video Conferencing Equipment**

If we will have attendees coming in virtually or phone we should ensure that the conferencing equipment is set up beforehand so that no one misses out on important parts of the meeting.

**A Coffee Maker and/or Hot Water Boiler for Tea**

We should have these so the attendees will be more focused and it can help them pay more attention to the topic and discussion.

## PLANNING FOR SENSORY CUES AND TREATS

**Engaging 5 Senses (Planning On Sensory and Treats)**

We agree that engaging the five senses in event planning takes a lot of thought. Deciding on how to best feature the senses can be challenging. But it doesn't have to break the bank or offer too many complexities that might jumble the message.

A company's ultimate goal is to create a meaningful and memorable impact on their audience. The hope is that the message influences how person thinks and behaves towards an organization, brand, product or services. However, there is no other part of the marketing matrix as powerful as an event. This is because it brings you face-to-face with your audience. The key is building your event or meeting to achieve maximum effect. The best way to accomplish this is by engaging the five senses in event planning.



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**Sight**

Appeal to your event attendees' sense of sight by making effective use of stimulating visual content. Picture booths and virtual reality, continue to gain momentum and popularity as creative ways to engage guest visually. You can also bring the sensorial emotional appeal by using a video and creative lightning techniques.

Sight is probably the sense that gets the most use at events (although hearing may have something to say about that).

**Sound/Hearing**

Selecting the appropriate soundtrack for the atmosphere at your event helps to build a fully immersive world rather than something that feels like an exhibit. Be sensitive to the effects of different styles and preparations of music on your attendees. Jazz, for instance, has been shown to reduce stress levels. Also, music performed live excites audiences and creates an incredibly memorable experience. You can design and orchestrate a "score", if you will, that accompanies different parts of your event. The subtle tempo of musical accompaniment can take a moment from "special" to "unforgettable."

**TASTE**

Taste isn't just about great tasting food. It is also about how you integrate the food into the event itself. You want to align the taste component with the attendees and locations. Taste should be as much about the experience of eating as the eating itself.

**SMELL**

We all have that one smell that automatically transport us back in time.

As mentioned above, smell is inexorably tied to memory.

Anyway, event marketers are getting wise to the power of smell on our feelings. A newer vehicle for brand-to-consumer engagement known as "Scent Marketing" targets our sense of smell and the way we attach emotions to memories.

**TOUCH**

Touch is also a great way to introduce a new sensory experience to your guests. Invite attendees to use their sense of touch to explore an installation or space.

One of the new trends for events on 2019., incorporates touch into an augmented reality experience. For instance, event AV can use touchable water surfaces in their AR experience to create an experience that guests will never forget! Another way to incorporate touch for a multi-sensory events is to use life-size props or games with parts that guests can pick up and feel their way around the space.



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## CONTINGENCY PLANNING

## SAFETY AND SECURITY

### Safety and Security

In today's event environment there is an ever increasing demand for security infrastructure systems to be defined, managed and implemented. An appropriate security infrastructure solution depends on the level of risk accepted by you as the event owner and your key stakeholders.

### Difference between Security & Safety

Security:
- Protection against external threat
- It is a physical aspect
- Deliberate threat
- Broad Coverage (Border etc.)

Safety:
- Protection against internal threat
- Emotional Aspect
- Unintended Threat
- Narrow Coverage (Building etc.)

### The Pre -Planning Phase

### Determining and Acquiring the Security Workforce

1. Most event organizers will hire a professional security firm to provide services prior to and during their event.
2. The security firm should be responsible for providing an adequate number of qualified security personnel.
3. If staffing questions arise, it may be prudent to obtain the opinion of your local law enforcement agency to assure adequate resources are being deployed.
4. In estimating the number of security personnel needed for a special event, it is always best to err on the side of having too many rather than not having enough.

### Crowd Control

1. Crowd control practices are critical to the success of your event for comfort and safety. Inadequate controls could lead to injuries from slips, trips and falls, altercations, children being separated from their parents and patrons being injured by the crowd.



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2. Consideration needs to be given to paths of travel for access to and egress from the event.
3. It should also be given to how patrons will move from one activity to another during the event.
4. One way traffic patterns and temporarily stopping opposing foot traffic are often helpful. Access, egress and travel paths should be well delineated, smooth, and free of trip/slip hazards.
5. Fencing, barricades, ropes, or uniformed security staff may be helpful in delineating travel paths.
6. These practices should also be employed to keep patrons from travelling through areas that present hazards such as uneven ground, traffic, equipment or other concerns.

**Transportation / Traffic**

In developing security plans for major special events, all transportation modes
that may have an impact on the security of the venue need to be reviewed. Working with transportation officials, traffic engineering, fire/EMS, and others, decision may be made to close streets, re-route traffic patterns, close transit stops, and the like for security purposes.

**Surveillance and Observation**.

The use of security video cameras has increased at special events because Cameras can double as logistical and security tools as well as an aid in claim defense.

1. Staff can monitor the cameras to detect and record attempted security breaches and also to observe the movements of dignitaries, performers, or speakers to ensure the timing of events.
2. Security personnel can also use video cameras to identify someone who commits a crime (spectator, protester) and arrest them later when it might cause less of a disruptive scene.
3. Digital videos store and search long after the event. In addition to using video cameras, many law enforcement agencies position officers on rooftops or other high vantage points to observe crowd behavior during special events.

## PROBLEM ANALYSIS AND CONTINGENCY PLANNING

**Problem Analysis**

A problem analysis is an investigation of the causes of an incident, issue or failure.

**Contingency Planning**

*Contingency*



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A future event or circumstance which is possible but cannot be predicted with certainty.

*Contingency Plan*

A plan that will direct your activities in the case of any major or minor trouble. This plan not only works as a predictor of emergencies but will also help you to be equipped enough to cope with them.

**Some Areas That Might Cause Troubles During The Event**

**Technology**

Facing a technological problem is an extremely common yet troublesome issue for events. The best way out is:

- Check every single tech device before the event starts;
- Have backups for as many equipment as possible;
- If there are any videos, audios, images, etc. to be displayed during the event, play them completely before the event starts in order to prevent glitches;
- Have an efficient team ready for handling all sorts of tech problems.

**Security**

In order to prevent trespassers from entering your event venue, you need to make appropriate event security arrangements. Some venues also provide security arrangements. If not, you can arrange a team on your own. Either ways, ensure that:

- There are enough capable members on the event security team;
- The venue is well equipped with CCTVs, metal detectors, etc. according to the requirement;
- A special event security team is arranged for any VIP guest that you are expecting;

**Medical**

Medical emergencies can take place anywhere, anytime. As an event planner, you need to ensure that there are sample arrangements for providing medical services for all your guests and attendees.

You need to arrange:

- At least 2–3 team members who can provide first-aid care and CPR;
- A complete first-aid kit (including some basic medicines);
- Quick access to an ambulance for extreme cases.



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**Accidents/Disasters**

- Fire outbreaks, earthquakes and other accidents and disasters come totally uninvited. However, they are not so common, you need to be ready to tackle the situation if the need arises. To prepare for such situations:
- Acquaint all your team members with the emergency exit routes;
- Keep equipment like fire extinguishers handy.

**Team**

All your team members are susceptible to health issues, family emergencies or anything else that might prevent them from reporting on time and carrying out their work.

**Guests/Speakers/Performers**

Just like your team members, your guests or speakers might also need to cancel their attendance at the last moment. In order to prevent chaos or problems in such situations, you can take the following measures:

- Try and make arrangements in a way that your guests or speakers report to the venue a few hours before they need to be present publicly;
- If the guests might run a little late, prepare some alterations that can be made to the event schedule accordingly;

**Budget**

While planning the overall budget for your event, save some appropriate amount for dealing with contingencies as well. The point here is not to go paranoid with every single thing related to your event and overspend on prevention and cure. You only need to take care of the bare minimum and you will be good to go.

## CRISIS MANAGEMENT PLAN

**What is Crisis?**

According to Merriam-Webster, crisis is an unstable or crucial time or state of affairs in which a decisive change is impending especially one with the distinct possibility of a highly undesirable. And according to Cambridge dictionary, crisis is an extremely dangerous or difficult situation.

**Types of Crisis**

*Natural Disaster* - Environmental phenomena like earthquakes, tornadoes, floods, landslide, tsunamis, and storms that threaten life, property and the environment.

*Man-made Disaster* - Fires, stampedes, transport accidents, terrorist attacks etc.



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*Confrontation Crisis* - Resisting or disobeying the authority, common type is boycotts.

*Crisis of Organization Misdeeds* - When management takes actions it knows will harm or place stakeholders at risk for harm without adequate precautions.

*Workplace Violence* - When an employee or former employee commits violence against other employees on organizational grounds.

*Rumors* - False information that creates crises hurting the organization's reputation. EX. making stories about the product or event.

**Stages of Crisis**

**Pre-Crisis Phase**

Prevention involves seeking to reduce known risks that could lead to a crisis. This is part of an organization's risk management program. Preparation involves creating the crisis management plan, selecting and training the crisis management team, and conducting exercises to test the crisis management plan and crisis management team.

Organizations are better in handling crises when:

- They have a crisis management plan that is updated at least annually,
- Have a designated crisis management team,
- Conduct exercises to test the plans and teams at least annually, and
- Pre-draft some crisis messages.

The planning and preparation allow crisis teams to react faster and to make more effective decisions.

*Crisis Response*

The crisis response is what management does and says after the crisis hits. Public relations plays a critical role in the crisis response by helping to develop the messages that are sent to various publics. A great deal of research has examined the crisis response.

That research has been divided into two sections:

- The initial crisis response and
- Reputation repair and behavioral intentions.

*Initial response*

Practitioner experience and academic research have combined to create a clear set of guidelines for how to respond once a crisis hits.

The initial crisis response guidelines focus on three points:

- Be quick,
- Be accurate, and
- Be consistent.



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Be quick seems rather simple, provide a response in the first hour after the crisis occurs.

**Post-Crisis Phase**

In the post-crisis phase, the organization is returning to business as usual. The crisis is no longer the focal point of management's attention but still requires some attention. As noted earlier, reputation repair may be continued or initiated during this phase. There is important follow-up communication that is required.

First, crisis managers often promise to provide additional information during the crisis phase. The crisis managers must deliver on those informational promises or risk losing the trust of publics wanting the information.

Second, the organization needs to release updates on the recovery process, corrective actions, and/or investigations of the crisis. The amount of follow-up communication required depends on the amount of information promised during the crisis and the length of time it takes to complete the recovery process.

Intranets are an excellent way to keep employees updated, if the employees have ways to access the site. It reports how mass notification systems can be used as well to deliver update messages to employees and other publics via phones, text messages, voice messages, and e-mail. Personal e-mails and phone calls can be used too.

**What is Crisis Management?**

An event crisis is problem that has gone out of hand causing damage of serious magnitude. Damage or the negative effect of this crisis may affect the person, property, or reputation.

Crisis management refers to actions taken by an organization to maintain its credibility and good reputation after a situation has occurred that may affect it in a negative manner and therefore reduce sales its products or services.

**Goals of a Crisis Management Plan**

- Protect public health
- Continue operating
- Minimize damage to reputation, brand, and image
- Minimize loss of customers
- Minimize financial losses

**Importance of Crisis Management Plan**

It takes time planning every detail of a trade show to make sure everything goes right; yet oftentimes not enough thought goes into knowing what to do when something goes wrong. Worst-case scenario wrong. It's an uncomfortable and sometimes controversial topic, but it has



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to be addressed honestly, otherwise mistakes can be made and scenarios overlooked. Not having a crisis management plan can result in chaos and pandemonium, or worse.

Reliable and proper communication should be at the heart of any crisis plan. It should go without saying that if everyone is not properly trained and on the same page, implementing your plan will be difficult. Develop your plans with the help and advice of professionals who can point out any faulty or inadequate strategies. Once your plans have been finalized, make sure you hold a training session for your entire staff to familiarize them with the details. There should be a chain of command included in your plans. It is sometimes referred to as an emergency call tree. This communication model is used to notify specific individuals in case of an emergency. It operates something like this: The first person the Show Manager calls will be the one who initiates the call tree. That person will notify three other individuals who will then notify four other people who will continue to notify the rest of the contacts down the line. To ensure success, put the following into practice

**Outline of a Crisis Management Plan**

A crisis management plan outline can come in different structures and presentations, as some scopes of risk assessed may be broad and far reaching. In such cases, these types of contingency plans include different phases. They may comprise the establishment of a command center, to acts of mitigation, communication processes, and recovery strategies through the final phase of disengagement from all operations.

On the other hand, there are crisis management plans that provide only for actions pertaining to communication responses and the chain of command. They are cases where the organization has previously decided that all actions should have prior legal consultations and professional assessments of the current situations, including media impact, before any steps or measures are taken.

In such cases, these types of contingency plans contain outlines of the persons to be reached in cases of crisis. The main content is a list of emergency contacts. The important factor is the observations of protocol, which starts with the principal figure who will make the final decision. The next in line are his alternate, his legal counsel, his advisors, and the media.

*Preparation*

- The Purpose of the Crisis Management Plan- This is a definitive statement as to what the organization considers as critical situations and a general overview of what the outline intends to achieve. A basic outline for a crisis management plan usually presents the crises or threats being contemplated immediately after the purpose is stated.
- Critical Scenarios to Be Addressed by the Action Plans- This is a list of the threats assessed and identified as requiring immediate attention, which may emanate from natural or man-made occurrences.

All these risks have the potential to bring about permanent damages. In order to arrest their impact and potential for greater losses, a plan of action is required to mitigate their effects and



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to communicate to the public that corrective measures are being undertaken. Thereby, the effectiveness of these plans will allow the company to regain and maintain control over a serious situation.

*Crisis Responses*

- Be honest and open—Nothi
- Keep employees informed--Maintaining an informed workforce helps ensure that business continues to flow as smoothly as possible. It also minimizes the internal rumor mill that may lead to employees posting false reports on social media.
- Update early and often--It is better to over-communicate than to allow rumors to fill the void. Issue summary statements, updated action plans and new developments as early and as often as possible. Remember that with today's social media and cable news outlets, we live in a time of the 24/7 news cycle. Your crisis plan must do the same.

**Evaluation/Assessment**

**Module 4**

**Identification:**

_____1. Described as a public assembly for the purpose of celebration, education, marketing or reunion.
_____2. The first thing to do before starting an event.
_____3. A key document that outlines all of the elements of an event.
_____4. The place where an event or meeting is happening.
_____5. An investigation of the causes of an incident, issue or failure.
_____6. A future event or circumstance which is possible but cannot be predicted with certainty.
_____7. A plan that will direct your activities in the case of any major or minor trouble. This plan not only works as a predictor of emergencies but will also help you to be equipped enough to cope with them.
8. In order to prevent trespassers from entering your event venue, you need to make appropriate event _____ arrangements.
_____9. An unstable or crucial time or state of affairs in which a decisive change is impending especially one with the distinct possibility of a highly undesirable.
_____10. False information that creates crises hurting the organization's reputation.

## MIDTERM EXAMINATION

1. Assuming that you will have an event, you are tasked to prepare event goals and objectives.
2. As an event manager, why is it important to have a contingency plan?



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## Module 5

## Events Budget and Timeliness

Objectives

At the end of this module, students are expected to:

1. Understand the event expenses;
2. Identify the sources of revenues;
3. Explain the event budget.

Module 5 covers the following topics:

1. The event budget
2. Understanding event expenses
3. Sources of revenues
4. The revenue forecast
5. Drafting the event budget
6. The event timeline



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## EVENTS BUDGET AND TIMELINESS

## THE EVENT BUDGET

### What is budgeting?

Budgeting is the process of creating a plan to spend your money. This spending plan is called a budget. Creating this spending plan allows you to determine in advance whether you will have enough money to spend in your event.

### What is the purpose of budgeting?

The primary importance of budgeting an event is to provide the balance of quality in the exchange for goods or services. By staying within your budget you protect yourself from going into debt.

### Tips in Budgeting an Event

The first step to creating your event budget is to figure out each part of your event that could potentially incur a cost. By including every part of the event, you're able to get a more accurate budget versus one that simply includes the bigger pieces of an event. This is a preliminary step that you can continue to get a more accurate and balance budget.

### Look Into Past Events

If you've hosted this event previously, you can look back at the amount that was spent on previous events. Look at the line items that were utilized, and the number of guests that attended. If you expect that the event will expand in the current year, it is important to keep everything proportional in your budget by using multipliers. Historical data will help put a benchmark budget in place.

### Track Your Expenses

An easy way to track your expenses is to simply write down every penny that you spend and where you spend it.

### Build Your Budget and Expense Checklist

Having a budget/expense checklist will keep you organized and help manage expenses. Here are some items that are necessary:

- Venue
- Advertising and Promotion
- Speakers/Performers accommodation



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- Catering
- Equipment
- Team/Staff
- Admin
- On-site expenses

**Find Low-Cost Marketing Options Online**

Marketing is another expense that can grow exponentially if you don't get results right away. The catch, of course, is that unless you market effectively there won't be enough attendees to support the costs of the event. This is why it makes sense to utilize as many free or low-cost options to spread the initial word about an upcoming occasion.

**Leave an emergency fund**

You just never know what's going to happen in the days leading up to an event. Working some leeway into your budget gives you enough breathing room to absorb unexpected costs.

## UNDERSTANDING EVENT EXPENSES

**Understanding Event Expenses**

It's hard to plan an event budget without a good idea of the expenses you will incur. That seems obvious, but the costs associated with event planning can come from a number of different places. Just when you think you have identified all of your expense categories, another one pops up to send you back to the drawing board.
To prevent this from happening to you, use this outline of event planning expenses while creating your budget.

**On-Site Event Expenses**

These Include the costs and fees typically charged by the event venue. Often the most expensive category, it's also the easiest to predict since you will get a formal cost estimate to review in advance. Don't forget to factor in variable costs that change based on your attendance numbers. Catering is an example of a variable expense because the amount of food you need— and subsequently the cost— increases with each addition to your party.

*Here is a punch list of on-site event expenses to put into your budget:*

**Venue Costs**

These are the premises costs:

- Room Rental



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- Security Deposit
- Insurance Coverage
- Parking

**Food and Catering**

Here's everything tied into eating and drinking:

- Meals
- Beverages
- Bartender/Server Labor Fees
- Tax and Service/Gratuity Fees

**Audio/Visual**

These are your presentation costs:

- Microphones
- Screens and Projectors
- Internet Access
- Other Specialized Equipment

**Third-Party Vendors**

This category represents all the items and services supplied by vendors outside of the host venue. Each one will bill you independently, so it is important to keep close tabs on every vendor. Using a spreadsheet will help organize your vendor contacts along with the costs associated with their services.

**Event Rentals**

These expense relate to anything you need to supply:

- Linens, Table Skirting, and Chair Covers
- Tents, Staging, and Amusement Attractions
- Physical Items Not Provided by Venue
- Labor and Delivery for Setup/Teardown

**Décor Vendors**

Making things look good will incur costs for:

- Accent Lighting
- Flowers and Centerpieces
- Balloons



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**Entertainment**

Don't forget the fees associated with:

- Musicians or DJ
- Speaker Fees
- Contract Riders (food, lodging, transportation)

**Production Expenses**

Production includes all of the staff and resources required to plan and execute the event. These expenses begin the moment the event is dreamed up and continue through the post-event paperwork. In short, this category represents the cost of organizing the event, attracting attendees, and managing the administrative elements.

**Marketing and Registration**

This category can add up with costs for:

- Print and Web Design Work
- Advertisements
- Invitations
- Registration Management

**Planning and Organization**

Events require people and the expenses include:

- Event Planner Fees
- Part-time and Temporary Employees
- Office Supplies
- Communication Costs
- Travel Expenses

**Administrative Expenses**

Don't overlook the paperwork and costs for:

- Salaried Employee Assignments
- Accounting Costs
- Legal Fees
- Consultant Fees



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**Cost Overages and Emergency Funds**

The purpose of this outline is to make you aware of the different types of event planning expenses that can occur. Every event is unique, so yours may include more or less of the items listed. The important thing is to know where your costs will be coming from. Overlooking expenses associated with a particular vendor or category can wreak havoc on your budget, but the worst case scenario is completely forgetting about an expense until the bill arrives.

**Fixed Costs**

A cost which remains unchanged regardless of a company's level of output or revenue.

**Variable Costs**

Cost that fluctuates directly with changes in output

**Security Deposit**

An amount of money that a renter pays when beginning to rent property (such as an apartment) and that can be used to pay for any damage that the renter causes to the property

## SOURCES OF REVENUES

**Revenues**

Represent money coming into the event or organization through an exchange of money for goods or services. Revenues are referred to as the top line because of their location on the income statement--typically on the statement's first line.

**Samples Sources of Revenue**

1. *Tickets, Registrations, And Memberships*

Tickets, registrations, and memberships from attendance at or participation in an event generate revenues from spectators purchasing tickets to attend the event. This revenue category is an important revenue stream; therefore, event organizers should work to identify multiple ways to facilitate purchase of tickets, registrations, and related memberships fees.

2. *Sponsorships*

Spectator and participatory of the events often generate revenues through sponsorship rights by partnering with corporations and other organizations. Event organizers may agree to create signage, booths, or other displays promoting the sponsorship. In exchange for a sponsorship fee, the sponsor has the opportunity to reach a desired target market attending or participating in the event.



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*3. Merchandising And Licensing*

Sport organizations view sales of merchandise and licensing rights as another revenue opportunity. These products satisfy fans looking for ways to commemorate their attendance at various sporting events and to show their affiliation with a specific athlete, team, league, or sport. Spectators and participants alike appreciate the opportunity to purchase related merchandise likes, clothes, shoes, mugs, tarpaulin and the likes.

*4. Food And Beverage Sales*

Spectators may purchase concessions while attending an event, creating another revenue stream for sport organizations. Budgeting for food and beverage sales is very similar to budgeting for merchandise sales in that you have to consider per cap sales and the type of agreement you enter with your facility or concessionaire.

*5. SOUVENIR PROGRAM SALES*

Many events will derive revenue from the sales of souvenir or commemorative programs. These programs provides customers with memorabilia that may appreciate in value over time. Keeping in mind that not everyone will be interested in purchasing a program, some events choose to give away programs in order to put the materials in the hands of more consumers and to provide more value for sponsors.

## THE REVENUE FORECAST

### THE REVENUE FORCAST

Forecasting business revenue and expenses during the startup stage is really more art than science. Many entrepreneurs complain that building forecasts with any degree of accuracy takes a lot of time--time that could be spent selling rather than planning. But few investors will put money in your business if you're unable to provide a set of thoughtful forecasts. More important, proper financial forecasts will help you develop operational and staffing plans that will help make your business a success.

Here's some detail on how to go about building financial forecasts when you're just getting your business off the ground and don't have the luxury of experience.

**1. Start with expenses, not revenues.**

When you're in the startup stage, it's much easier to forecast expenses than revenues. So start with estimates for the most common categories of expenses as follows:

**Fixed Costs/Overhead**

- Rent
- Utility bills
- Phone bills/communication costs
- Accounting/bookkeeping
- Legal/insurance/licensing fees



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- Postage
- Technology
- Advertising & marketing
- Salaries

**Variable Costs**

*Cost of Goods Sold*

- Materials and supplies
- Packaging

*Direct Labor Costs*

- Customer service
- Direct sales
- Direct marketing

**2. Forecast revenues using both a conservative case and an aggressive case.**

If you're like most entrepreneurs, you'll constantly fluctuate between conservative reality and an aggressive dream state which keeps you motivated and helps you inspire others. I call this dream state "audacious optimism."

Rather than ignoring the audacious optimism and creating forecasts based purely on conservative thinking, I recommend that you embrace your dreams and build at least one set of projections with aggressive assumptions. You won't become big unless you think big! By building two sets of revenue projections (one aggressive, one conservative), you'll force yourself to make conservative assumptions and then relax some of these assumptions for your aggressive case.

**3. Check the key ratios to make sure your projections are sound.**

After making aggressive revenue forecasts, it's easy to forget about expenses. Many entrepreneurs will optimistically focus on reaching revenue goals and assume the expenses can be adjusted to accommodate reality if revenue doesn't materialize. The power of positive thinking might help you grow sales, but it's not enough to pay your bills!

The best way to reconcile revenue and expense projections is by a series of reality checks for key ratios. *Here are a few ratios that should help guide your thinking:*

***Gross margin.*** What's the ratio of total direct costs to total revenue during a given quarter or given year? This is one of the areas in which aggressive assumptions typically become too unrealistic. Beware of assumptions that make your gross margin increase from 10 to 50 percent. If customer service and direct sales expenses are high now, they'll likely be high in the future.



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***Operating profit margin.*** What's the ratio of total operating costs--direct costs and overheard, excluding financing costs--to total revenue during a given quarter or given year? You should expect positive movement with this ratio. As revenues grow, overhead costs should represent a small proportion of total costs and your operating profit margin should improve. The mistake that many entrepreneurs make is they forecast this break-even point too early and assume they won't need much financing to reach this point.

***Total headcount per client.*** If you're a one-man-army entrepreneur who plans to grow the business on your own, pay special attention to this ratio. Divide the number of employees at your company--just one if you're a jack-of-all-trades--by the total number of clients you have. Ask yourself if you'll want to be managing that many accounts in five years when the business has grown. If not, you'll need to revisit your assumptions about revenue or payroll expenses or both.

## DRAFTING THE EVENT BUDGET

**Drafting the Event's Budget.**

So first let's define the word drafting. When we say drafting, it is a preliminary version of a document. It is unpolished or not final. The next word is event. The word event is very broad, it can be an event for a cause, a business event or an event for a celebration. The last word is budget, it is the allotted money for a certain project.

*Let's take deeper of it. I am going to tackle about the steps on how to draft an event's budget.*

**Step 1. Know Your Budget**

You should know your budget to know your limitations as well as to lessen your expectations. It is like buying in a grocery, if you don't know your budget you tend to over-shop or lessen it that much.

**Step 2. List Down Everything**

You should list down everything that you think that is needed for your event. Let say for example, you need a venue, write it down. You need a photography, catering, jut all of it down. It will serve as a guide for you to follow or a simply checklist.

**Step 3. Canvass**

Canvassing is a combination of excitement and hardship, because it will take time for you to find the best that suits for your event and a little bit fun because you may find something different.

**Step 4. Budget Wisely**

Budget wisely specially if you want to gain money through your event. Remove the expenses that you think that is not necessarily needed.



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## THE EVENT TIMELINE

### What is an event planning timeline?

The timeline of an event is a detailed structure of your event with careful calculations of time and resources, with the execution highlights and deadlines clearly marked.

### Why you need an event timeline?

Having an event timeline is an integral part of the event planning process. The event timeline is your guiding light through the timeline for event planning process. Without a timeline in place, you may find yourself lacking focus and potentially missing important deadlines and risking complete event failure.

### How Far Out Should You Create Your Event Timeline?

The amount of time in advance that you create your event timeline will be dependent on what type of event you are planning. If you are planning a major conference or festival this timeline may need to be created a year or more before your event date to book major venues and book event entertainment. However, if you are planning something smaller like a corporate meeting or gathering you may only need 6 months.

### Day of Event Timeline

It is so important to have a schedule for your event. You put in a lot of hard work planning and it all comes down to the big show! You may feel stressed out and under a lot of pressure but there is no need to be, you have planned it all out!
Having a solid schedule for your event day(s) will help everything run smoothly. Below are some items you will want to include in your “day of” schedule and tips to think of while creating it. Not sure what you need on your day of timeline? Here are some tips and must-haves for your day(s) of event timeline!

*Don’t Miss Any Details*

When creating your day of event timeline try to think of every detail. Plan the day the way you envision it to go. Always be realistic with times and expectations. Anyone in the event industry knows an event rarely goes exactly as planned. There are always unexpected situations that pop up, sometimes speakers go overtime, maybe your caterer decides to show up late, whatever it may be allowed time for the unexpected.

Once you have your day of timeline completed share it with your team. They will be able to help make sure each part has realistic time estimates. Always be sure to include time for guests to get from one portion of your event to the next. If you have a keynote speaker followed by dinner in another location plan for the time it takes to get from one place to the next.



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*Creating Your Day of Event Timeline*

While timelines leading up to events have similar markers, the day of event timeline is going to be very unique to your event. There are a few items likely to pop up on all agendas and events which I will address but be sure to create your own based on your own unique events elements.

**After the Event**

*Hold event debrief meeting*

Meet with your staff after your event for feedback. Ask what they think went well and what needs to be improved upon for next time! It is best to do this meeting as close to the event as possible so it is fresh in everyone's mind.

*Complete comparison of actual versus budgeted costs*

Now that the event is over you have all the information you need to compare the actual costs of your event vs. the budget. This is also a great time to be critical and see what can be improved upon in the future.

*Store all materials and Data to assist with planning of future event(s)*

After you have completed the above steps you are on the last step for completing your event timeline. Store away the feedback you have collected and data. At this time decide what worked and what needs changing for your next event. Finally, calculate your ROI.

**Evaluation/Assessment**

**Module 5**

**Enumeration:**

Sources of revenues (5 points)
Fixed Costs/Overhead (5 points)

**Activity:**

You were assigned to handle the recognition program in your school. As part of your tasks, prepare the following:

Budget Proposal
Event invitation



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## Module 6

## Event Coordination

Objectives

At the end of this module, students are expected to:

1. Recognize the different rules for the team;
2. Able to breakdown tasks;
3. Understand the event logistics

Module 6 covers the following topics:

A. The Event Team
   1. Task breakdown
   2. Manpower planning
   3. Rules for the team

B. Event Logistics
   1. Understanding the resources needed
   2. Working with multiple suppliers
   3. The speakers
   4. Music and entertainment



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**EVENT COORDINATION**

**THE EVENT TEAM**

**TASK BREAKDOWN**

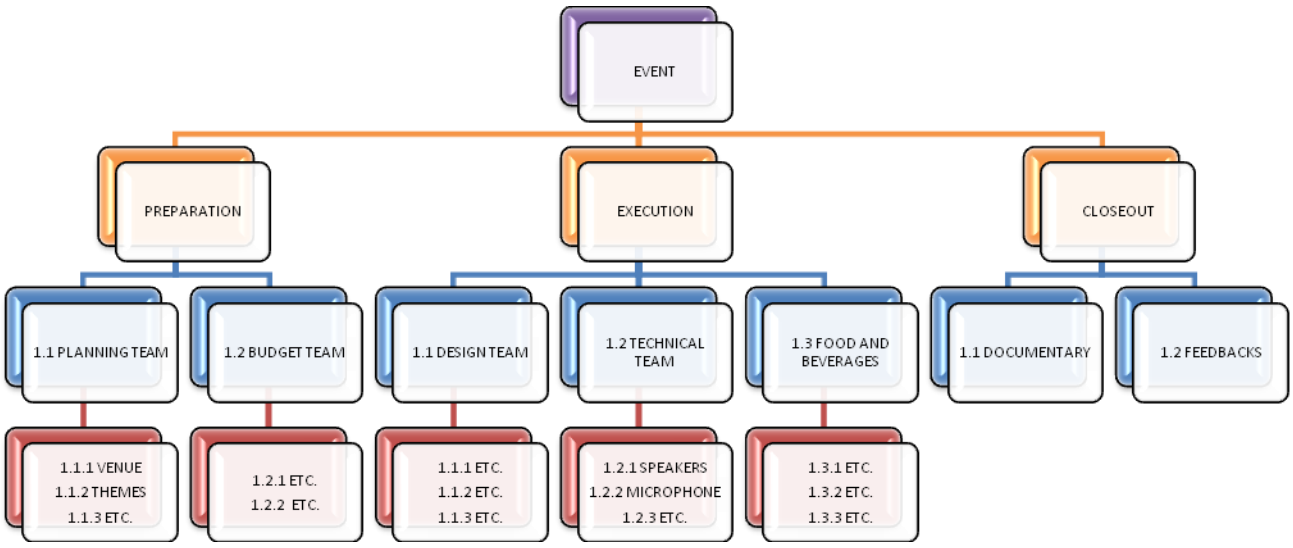
## Work-Breakdown

A work-breakdown structure (WBS) in project management and systems engineering, is a deliverable-oriented breakdown of a project into smaller components. A work breakdown structure is a key project deliverable that organizes the team's work into manageable sections.

The Project Management Body of Knowledge (PMBOK 5) defines the work-breakdown structure "A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables."

It is a tree structure, which shows a subdivision of effort required to achieve an objective; for example a program, project, and contract.
This is used to define and organize the total scope of a project. The development of the WBS normally occurs at the start of a project and precedes detailed project and task planning.

- A WBS is the cornerstone of effective project planning, execution, controlling, monitoring, and reporting.




## Plan outcomes, not actions

If the work breakdown structure designer attempts to capture any action-oriented details in the WBS, the designer will likely include either too many actions or too few actions. Too many actions will exceed 100% of the parent's scope and too few will fall short of 100% of the parent's scope. The best way to adhere to the 100% rule is to define WBS elements in terms of outcomes or results, not actions. This also ensures that the WBS is not overly prescriptive of



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methods, allowing for greater ingenuity and creative thinking on the part of the project participants.

**Coding scheme**

It is common for work breakdown structure elements to be numbered sequentially to reveal the hierarchical structure. The purpose for the numbering is to provide a consistent approach to identifying and managing the WBS across like systems regardless of vendor or service.

**Different Forms of Work Breakdown Structure**

1. *Phase-based structures*

Define and structure project activities based on the project phases.

2. *Deliverable-based structures*

Define and structure project activities based on the deliverables agreed to deliver.

3. *Responsibility-based structure*

Define and structure project activities based on the organization units that will work on the project.

## MANPOWER PLANNING

**Manpower Planning Definition**

Manpower Planning is consists of putting a right number of right people at the right place, right time, and doing the right things for which they are suited for the achievement of the goals of the organization or the event. Manpower planning is the process of estimating the optimum number of people required for completing a project, task or a goal within time. It is a never ending continuous process to make sure that the business has the optimized resources available when required taking into consideration of the upcoming future projects and also the replacement of the outgoing employees. Manpower planning is also called as *Human Resource Planning* or HR.

Since manpower planning is also known as human resource planning, it is the process that management uses to determine the manner in which an organization should move from point A to point B, in terms of manpower. This happens via planning and development together with having the right manpower that will help the organization achieve its goals, and will also benefit individual employees in the best way possible. This kind of planning enables HR departments to forecast which human resources are required to perform which jobs. The HR department will also assess which skills are required of employees for each job.



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**The Role of Human Resource in Event Planning**

1. **Developing Job Descriptions**

As professionals in the field, it must create an accurate job description for recruiting either permanent, contract or volunteer staff for an upcoming event.

2. **Advertising New Positions**

The human resource recruit applicants for open positions and help find the right employees for a given job or position.

3. **Conducting Interviews**

Once the HR have collect all numbers of applicant for the job advertised, it will arranged and conduct a number of interviews. A lot of jobs in the events industry require a specific skills and set of experience as much as in many areas.

4. **Training**

For the event to be successful the personnel must be have or provide or organize training for the correct employees. It is the one of the most important role of human resource for the employees to improve their skills and also for the event to be successful.

5. **Managing Performance & Expectations**

The HR department has to make sure they work together with other relevant figures to ensure that performance levels are managed correctly. The performance needs to be monitored and realistic expectations need to be set. HR professionals are the ones that plan and maintain performance management along with working closely with employees and their authorities to create expectations that are challenging and that will help them to further their skill sets and enhance their experience within the events industry.

6. **Payment and Rewards**

Ensuring that employees or contract workers are paid fairly for the work they produce in events. The reputation of the event, the company associated and the reputation of sponsors could be tainted if employees aren't paid on time or with the correct amount. In giving a reward, it is often used as a way of acknowledging and thanking the team members for their hard work.

7. **Time Keeping**

The teams needs to learn on how to manage their time for the event in able to finish the task on time and will not experience any hesitations.



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8. **Event Safety**

Produce concise safety at en event is particularly important and takes careful consideration and months of planning that will protect both employees and attendee. For examples, the use of heavy equipment and large displays are often utilized during events, which could mean the need for forklifts or other forms of transport to move equipment to different locations.

**Manpower Planning Process**

1. *Analyzing the current manpower inventory*

Before a manager makes forecast of future manpower, the current manpower status has to be analyzed. For this the following things have to be noted:

- Type of organization
- Number of departments
- Employees in these work units

2. *Developing employment programs*

Once the current inventory is compared with future forecasts, the employment programs can be framed and developed accordingly, which will include recruitment, selection procedures and placement plans.

**RULES FOR THE TEAM**

**Rules for the Team**

Having a strong team also helps with problem-solving. Each person brings a unique perspective to the event that can appeal to more guests or help find creative solutions. Many hands make light work, and working with people with a variety of skills can make planning an event less stressful.

Great teams don't just happen. It takes work and effort to find the right combination of skills and personalities. Event planning teams aren't a one-size-fits-all approach. What works for one event might not work for another event. The key is to understand the scope of the event and put the right people in place that can get results.

Although the actual layout of each event varies, the basic requirements don't. Here's the ultimate guide to putting together your event planning dream team. No matter the size or type of event, sticking with these basics can help you create the perfect planning team.

**Definition of Team**

A team is a group of people who work together toward a common goal. Teams have defined membership and a set of activities to take part in. Each member have a different skills, and different tasks, who work together on a project, service, or goal with a meshing of functions and mutual support.



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**Program Administrators**

Handling everything from catering to scheduling activities, the program administrators organize all the fine details of the event. This is arguably one of the most important committees. The team captain may have the overall vision, but the program administrators are the ones who make it happen. They coordinate all the details and logistics of the event.

**Creative Committee**

The creative committee somewhat speaks for itself. They are your in-house ideators and implementers of the media, marketing, attendee engagement, and more. The creative committee builds the brand of your event and ensures it's consistent throughout the entire event, from pre-event marketing to an after-event survey. They're the creative minds that add an extra flourish to create a memorable event that gets people talking.

The creative committee should have a strong understanding of the theme and goals of the event. How you design and market a large trade show is much different than how you design and market a shareholder conference. Let this committee have some free reign to let their creative juices run wild, but make sure that their efforts still tie into the strategic goals of the event.

The creative committee can have a fairly intense job. This role is vital to making the event a venue aesthetically pleasing. Many teams use contracted labor for duties such as photography and videography

**Treasury Committee**

The treasury committee handles the money. This includes the budget, payment disbursement, and funding from sponsors and grants. Without a solid treasury committee, your event might not have the funds to reach your goals. The treasury committee should be involved in the planning process from the very beginning stages. After all, the budget dictates the scope of the event. The treasury committee should be responsible and transparent to ensure the money is protected and used properly. Ideally, you want people who will stick to the budget and find creative ways to cut costs without sacrificing quality.

Overall, the treasury committee is responsible for anything related to money and record keeping. In most cases, the committee only needs to consist of two people. One person can coordinate budgeting with other committees, and another person can pay expenditures and keep track of transactions. For larger events, those roles can be broken up to include an additional two people.



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## EVENTS LOGISTICS

## UNDERSTANDING THE RESOURCES NEEDED

### Event Logistic

- Flow of things between the point of origin and point of consumption
- Responsible for satisfying customer, and meeting the customer demands
- For creating visibility into company's supply chain

### What is Resource Management?

Allocating the resources in the best possible way to maximize efficiency

1. Pre-planning
2. Scheduling
3. Management

*Resource management is used in every aspect of a business. This includes but not limited to:*

- Finances - money
- Staffing - designers, auditors, crews, drivers
- Space and rooms - meeting rooms, office studios, warehouses
- Equipment and technology - tables, chairs, vehicles, cameras, speakers and lights

### Why is effective Resource Management important?

- Planning and managing your resources assures you that all your resources are used effectively, on time and they follow the budget
- Doing more with less (because nobody likes waste, especially in business)
- Resource management is centered on optimization and efficiency

### What are the advantages to Resource Management?

**Maximizing resource efficiency:** *Resource Utilization*

It shows the percentage (%) of the resource in use for the selected time slot. Can be used to measure the time spent, skill, and effort exerted.

**Getting a bird's eye view of your project:** *An overview*

It helps to see exactly where the project is at, what still needs to be done, and by when to be done. Giving everyone better visibility and keeping all up-to-date.



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**Preventing miscommunication mishaps:** *Transparency*

Transparency helps prevent miscommunication between team members, managers, and clients. It is useful to everyone involved, increasing employee engagement and stakeholder trust.

**Predicting the future:** *Foreseeing and avoiding problems*

Planning can help you prepare for the future and make adjustments in advance, lets you understand the actual project timeline and making more accurate forecasts.

**Taking Control:** *Right Decision*

Control allows to measure resource performance, and helps to make the best choices for the company. This can help to grow and expand the business. It ensures that nothing is forgotten and issues can be solved ahead of time.

**What are some resource management techniques?**

*Resource Allocation*

Identifying the types and amounts of resources needed to fulfill projects. Assigning specific resources to specific project or task.

*Resource Leveling*

Balancing the workload of different resources over one project or even different project and solving the problem of needing one resource to do several task at the same time.

*Resource Forecasting*

It allows to predict your future resource requirements (determine unforeseen costs, and potential risks).

## WORKING WITH MULTIPLE SUPPLIERS

**The Case for Making Multiple Suppliers Part of Your Supply Chain Strategy**

Working with more than one supplier can help business owners sidestep an array of problems in their supply chain that could hurt their ability to deliver products to customers.

Having a single supplier for each item your company needs to do business makes sourcing simple. And while having multiple suppliers for each item can add complication, it also provides protection against the risk of interruption. Balancing these two concerns is a key task in crafting an optimal supply chain strategy.



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Relying on single sourcing as a supply chain strategy exposes a company to the possibility of not being able to get critical supplies in the event of a disaster that disrupts a supplier's operations. (Think fires or floods.)

Natural disasters are just one of the hazards that may cause a business owner to regret single-sourcing a vital component.

## THE SPEAKERS

If you are planning to do an event of course you need a Speaker.

**So What is Speaker?**

- A person who gives a speech at a public event
- The person who controls the way in which business is done in an organization which makes laws

Also Speaker they give their thoughts, to inform entertain the attendees and give the knowledge lends of the program.

**This is some guidelines of useful event speaker**

*Step 1: Outline the goals and objectives of your event*

Make a plan to your event. What do you want your audience to take away from the event? How can the speaker impact the overall experience for your group.

*Step 2: Identify your budget.*

How much is allotted in the budget for your speaker? Take into consideration any additional expenses that may be incurred such as flights, hotel, ground transportation and miscellaneous expenses.

*Step 3: Brainstorm the type of thought leader*

What would you like at your event based on the steps above. The message you would like to convey to your audience, the budget you have to finance speaker fees, and travel are vital component.

*Step 4: Choose the speaker you would like*

Pick the good one to your event. If the speaker declines, the bureau will either send another list of ideas or move on to speaker option number two, until a speaker has been confirmed.



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*Step 5: Execute agreements and invoices.*

Agreements will be sent to both you and the chosen speaker confirming the engagement details and all the logistics that it entails (speaker fee, travel expenses, Logistic, venue, date, speech topic, point of contact and etc.)

*Step 6: Brief your team.*

Of course you need to take time to your events team. For example, how to address them adequately when speaking to them, what items they like in their room, who is responsible for the speaker's introduction, etc. And always remember "Teamwork makes the dream work".

*Step 7: The day before.*

Confirm with the speaker's office all travel logistic are on course and that they have either arrived or are arriving at the hotel/venue. Confirm the all flights, ground transportation, greeters and hotel rooms should be confirmed as well. Additionally, make sure that the final invoice has been paid on time to prevent any issues with the speaker. Your event itinerary and program timeline should be finalized by this time.

*Step 8: Event day.*

Arrive early to the venue to guarantee that all is set up correctly and everything is in place. Contact the speaker/speaker point of contact to confirm their arrival time is set and still on track. Designate the person who will greet the speaker and direct them to their room or space where they can prove for their presentation.

*Step 9: During the event.*

Be on top of any last-minute problems or questions that could arise. Read the audience and make sure that the speaker is being received well and appropriately. When their presentation is over, direct them to either their next obligation(such as a reception, photo-op line or dinner). Note that while the speaker is on-site, a member of your team should always be with them and ready to assist if needed.

*Step 10: Communicate back to the speaker.*

Let the speaker know how did from helping you with logistic and handling the presentations. Communicating expectations and thoughts is the key to ensuring a successful partnership in the future.

*Step 11: Pay any outstanding item/invoices*

Often enough, speaker and their representatives incurred expenses when travelling to the event. These expenses are typically sent to you within two weeks to be paid. Make sure the all cost are covered and sent off.



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## MUSIC AND ENTERTAINMENT

### IMPORTANCE OF MUSIC & ENTERTAINMENT TO YOUR EVENT

- Music sets the mood for the event
- Music has a great impact to the attendees because it creates emotions and anchors the senses towards specific components of the event.

### IMPORTANCE OF LIVE ENTERTAINMENT TO YOUR EVENT

Live entertainment can help the guests to have fun and be relaxed. It could also be a nice way to engage better with others, getting the opportunity to talk about other light and fun topics.

### TIPS ON CHOOSING APPROPRIATE MUSIC FOR YOUR EVENT

1. Understand the psychology of the music.
2. Choose music that's tune in with your attendees.
3. Speak to your band or Dj about a "do not play" list
4. Select music in harmony with the event goal and the time of day.
5. Familiarize yourself with licensing requirements for the music you play at your event.
6. Check out the most popular songs played at conferences, but use them wisely.

### EXAMPLES OF ENTERTAINMENT

1.Singers 2. Impersonators/comedians 3. Dancers
4.Photo booth 5. Celebrity

### Evaluation/Assessment

### Module 6

Discuss the following:

- Role of Human Resource in Event Planning
- Resource Management Techniques
- Tips on choosing appropriate music for your event



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## Module 7

## The Event Control

Objectives

At the end of this module, students are expected to:

1. Differentiate the control function;
2. Explain the event budget monitor;
3. Demonstrate the event control technique.

Module 7 covers the following topics:

A. The Control Function: Monitoring Work, Time and Money

1.. Event control technique

2. Event timetable, sequence guide and production schedule
3. Event budget monitor
4. Photographs to capture memories



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## THE EVENT CONTROL

## THE CONTROL FUNCTION: MONITORING WORK, TIME AND MONEY

## EVENT CONTROL TECHNIQUE

### WHAT IS CONTROL?

- To have control is to have the power to run something in an orderly way.
- The power to influence or direct people's behavior or the course of events.

### WHAT IS EVENT CONTROL or EVENT MANAGEMENT?

It is the application of project management to the creation and development of large-scale events such as festivals, conferences, ceremonies, weddings, formal parties, concerts, or conventions.

It involves studying the brand, identifying its target audience, devising the event concept, and coordinating the technical aspects before actually launching the event.

### EVENT MANAGER

- Is the person who plans and executes the event, taking responsibility for the creative, technical, and logistical elements.
- This includes overall event design, brand building, marketing and communication strategy, audio-visual production, script writing, logistics, budgeting, negotiation, and client service.

## EVENT TIMETABLE, SEQUENCE GUIDE AND PRODUCTION SCHEDULE

### Event Timetable, Sequence Guide and Production Schedule

An event is something that happens when there is a special occasion or an assembly for the reason of celebrating, marketing, and even educating. It cannot be done without a proper plan or estimation of the time before the event day because it will help the organizers to prepare and allot a sufficient time in every task. The sequence of the program in an event is also important so that everything will be organize and will flow smoothly without any conflict.



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**Timetable**

Any schedule or plan designating the times at or within which certain things occur or are scheduled to occur.




**Importance:**

- It can ensure efficiency and productivity.
- It's all about knowing how much time you have to start with, and thus how much you can give away to certain tasks.
- It encompasses that other frequently cited skill of prioritization. Which means recognizing tasks based on importance and tackling things in a logical sequence to get the best result.



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**PRODUCTION SCHEDULE**

- Is the master timeline for coordinating live *event production* teams. It details what the various productions teams including audio, video, and lights will be doing over the course of an event onsite.
- Helps a lot in organizing the processes that will be done in a production.
- An important tool in helping the event organizers provide accurate, real-time schedules, decision support and available-to-promise date and quantities.

## EVENT BUDGET MONITOR

### Useful Tips to Monitor Your Event Budget

All the event planners know the importance of building a consistent event budget, which allows figuring out the relevance and size of the event. It's the only way to understand what you can afford with a given amount, and what should be removed from the list, because exceeds the budget limit.

A good budget planning could help us monitor our financial resources, splitting between catering, entertainment, venue, rentals and all the expenses closely connected to the event.

**Analyze all the expenses:**

In the initial phase of event planning, you have to define the budget available and prepare a checklist of the event key factors to take constantly under control, while monitoring the single expenses.

Since is quite common working with the same suppliers of a previous event, probably you already know their service and pricing. Therefore, we suggest you to fill out a detailed list of your suppliers, with the respective quality of service, costs and payment method.

**Establish goals and measure ROI (Return of Investment):**

Once you have defined the budget and created a list of suppliers, it's time to measure the ROI of your event. If you are organizing a business conference and are selling the tickets for the participants, try to track how many attendees have been recorded from the moment you have launched the online campaign. You can easily do it thanks to specific event management software like:

- Excel
- Google Drive
- Spreadsheet
- Google Docs
- Quick Books



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**Never lose sight of your goals and frequently monitor your budget in this way:**

Bring the budget plan with you and share it with your team. Update it constantly, in order to have a clear vision of the money spent. If you need to include in the budget some elements not considered in the initial phase of budget planning, try to organize a small meeting with your team, in order to understand whether these items should be added without any discussion or are not necessary.

**Create an Action Plan:**

Staying under budget is fundamental, but it can happen that there are extra charges to be addressed. This is the reason why you may want to allocate a small emergency fund to be used only in cases of necessity.

Therefore, it would be useful to create a small "event survival kit" for all those who work to the realization of the event, so that no one remains disoriented in case of schedule changes or budget.

In conclusion, if you follow these small simple steps, you won't have problems to manage your budget and face, without any fear, even last-minute problems.

## PHOTOGRAPHS TO CAPTURE MEMORIES

**Photographs to Capture Memories**

When planning a gathering like an event, a meetup, a town hall, or a conference for your nonprofit there are a lot of factors that need to be considered. One way to make things easier when it comes to event photography is to create a photo shot list.

People are always looking for easy confirmation that an event was a success. This is why it is so important to have a variety of high quality photos for use in blog posts, annual reports, sponsorship sell sheets, social media shares, and on your website, for example
*Event Photography*

A practice of photographing guests and occurrences at any event or occasion where one may hire a photographer.

*Event Photographer*

The official photographer for group events



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**How to Plan an Event Shoot**

**Do your homework on the event**

- Know who is in charge and get permission/endorsement
- Know the Location, Date/Time & Type of Venue?
- Know the Expectations of event organizers
    a. Specific images
    b. Types of images
    c. Know the Venue access limitations & safety considerations
    d. Image delivery expectations
- Desired uses of the images
- Understand the event – the needs and wants of the organizers and participants

**Plan what to shoot**

- Prepare a "shot list" of all the different kinds of images you want to capture

1. **Welcome/registration desk**- Start the day off right by capturing a few shots of the registration, or sign in, desk. At this point in the day people are generally excited about the event ahead and looking forward to making new networking connections. This is also a good idea because the registration desk will quite often get busy with people, which will make your event look full.

2. **Event signage**- If you can get a photo of attendees or speakers with the events signage in the background, then you will have an all-encompassing promo shot. No additional explanation required.

3. **Shots of every speaker while presenting**- In the nonprofit sector, event speakers often provide their time pro-bono. Thank them by providing them with images of their talk that they can then use as they see fit. The more exposure your nonprofit gets, the better.

*Tip: before sharing images around make sure you discuss with your photographer, as they legally own the rights to whatever pictures are taken unless otherwise stated*

4. **Shot of the organizer with the speakers**- It is always a good idea to grab a photo of the event organizer, program lead or VIPs with all of the speakers. Some of the speakers may prefer these formal shots to the candid ones of their presentation. Having all of the important players in one photo can also be used for social media publicity for the event.

5. **Candid shots of attendees**-If you're looking for an inviting, happy vibe to entice more people to come to the next event, then candid shots are the way to go. Try to make sure that everyone in the selected photos are engaged and enjoying themselves.



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6. **Formal shots of attendees**- If you are looking for more of a business vibe, then take a few formal group portraits. By getting 2-3 people together in a group photo you can be sure that you have captured all of the key players at your event.

7. **Anything unique about your event**- Anyone is capable of putting together a lecture series, but not everyone is capable of creating an event that will be talked about for a while.

**Evaluation/Assessment**

**Module 7**

_____1. The power to influence or direct people's behavior or the course of events.
_____2. It involves studying the brand, identifying its target audience, devising the event concept, and coordinating the technical aspects before actually launching the event.
_____3. Is the person who plans and executes the event, taking responsibility for the creative, technical, and logistical elements.
_____4. Something that happens when there is a special occasion or an assembly for the reason of celebrating, marketing, and even educating.
_____5. Any schedule or plan designating the times at or within which certain things occur or are scheduled to occur.
_____6. It details what the various productions teams including audio, video, and lights will be doing over the course of an event onsite.
7. One way to make things easier when it comes to event photography is to create a _____.
_____8. The official photographer for group events
9. Once you have defined the budget and created a list of suppliers, it's time to measure the_____ of your event.
10. In the initial phase of event planning, you have to define the _____.

**Enumeration:**

Event management software (5 points)
Importance of timetable (3 points)
Expectations of event organizers (2 points)



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## Module 8

## The Event Evaluation

Objectives

At the end of this module, students are expected to:

1. Tabulate audience feedback;
2. Explain the event profit and loss statement;
3. Discuss the review of objectives.

Module 8 covers the following topics:

A. Gathering audience feedback
B. Review of objectives
    1. The post-event meeting
    2. The post-event evaluation report
C. The event profit and loss statement



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## THE EVENT EVALUATION

## GATHERING AUDIENCE FEEDBACK

### Gathering Audience Feedback

Whether you're hosting a conference, a fundraising event, or an annual gala, you care about the impression you leave on your guest. But event staff spend so much time planning and executing, the post-event time period often gets little attention. Event and conference surveys are a great way to capture attendee feedback without spreading yourself too thin. They're simple to create and distribute, and they reveal a lot when done well. The number of questions, the length of the questions and detail in each question all have an impact on the quality of the feedback you're gathering. But above all, in gathering feedback, you would not want to just have any feedback but rather, you would aim to have positive feedbacks from your attendees. Going through this topic would provide guides on how you could gather positive feedback from your guests.

### Examine your registration forms

In examining registration forms, the main information you are to consider are the time and day as to when majority of your guests had the time to register. Through this, you could choose to post additional information and/or updates the same time and day majority of your guests were on their devices so that when they go through their social media accounts, there is a great chance of them seeing the post.

### Distribute surveys to your attendees

This process is the highlight of gathering audience feedback. Do make sure to distribute surveys right after the event to make sure that what happened during the said event is fresh in the memories of the attendees and they would most likely give feedback that are useful and accurate.

### Monitor your event on social media

Just because your event is over doesn't mean people will stop talking about it on social media. Continue to monitor what they say about the experience.

### Talk to your guest

Never underestimate the value of the simple conversation. Sometimes the best way to learn about your guests' experience is to simply talk to them. Obviously, this strategy does not scale



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well. You can't speak with everyone. But the information you learn from just a few conversations can be infinitely valuable. The trick, therefore, is to ask penetrating questions that uncover your attendees' true feelings.

**Promote your next event**

Promote your next event or include another compelling call-to-action, particularly for satisfied guests. Post-event surveys can reengage attendees and promote powerful follow-up action, like event sign-ups and donations.

## REVIEW OF OBJECTIVES

## THE POST-EVENT MEETING

**Post Event Meeting**

One of the biggest mistakes can make is forgetting to do a follow-up meeting after events. It's essential if you want to level up both your own and your team's skills since this is the time you can use to discover process improvements and boost morale after a hard day of organizing. Let's start by talking about why you need to have follow-up meetings, followed by what to do during those meetings and how to organize them to get the greatest impact.

**Why we need a follow-up meeting after events?**

- **Celebrate (and replicate) success**

All too often, we forget to acknowledge all the hard work everyone did during the event. It doesn't have to be a huge bash, but a small amount of recognition can go a long way towards energizing your team for the next event. TIP: use the meeting as a vacation and get your team to unwind at the same time.

- **Discover ways to improve**

The events industry is a competitive one and one-upping your own events is the mantra of most top professionals. Beyond pointing at your event's mishaps, focus on discovering ways to improve your attendee and client experiences. It's like hunting for hidden treasure!

- **Collect fresh new data**

The experience of an event is often a fleeting one. If you want to truly discover ways to improve your event, you need to collect new data straight from your team, attendees, and even vendors, while it's fresh in their minds.



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- **Start planning**

Let's not forget the main reason to debrief: getting a head start on your next event. Tempting as it can be to take a well-deserved time off, just hold it off for another day for a small huddle. It's rare to get everyone on your team on the same site, so don't waste it and start your pre-event planning right after.

**What to do during a follow-up meeting after events?**

1. **Collect feedback from attendees**

Getting feedback is probably the most important thing you need to during your follow-up meeting after events. It's the fuel you'll need to improve your future events, as well as a way to maintain a connection with your audience.

But if you've ever attended an event yourself, getting feedback isn't all that easy. People want to just enjoy the event, not answer some boring form. To help out, here are a few ways to encourage attendees to provide their feedback:

- *Start with a goal.*

Your post-event survey needs to be helpful in driving improvements in your future events. To do that, you need to set a goal for the survey. What do you need to learn from attendees? What do you want to change? From there, you can formulate a few focused questions that when answered, will give you a clearer direction to take for the next events.

- *Ask only what's needed.*

Let's face it: we all hate answering surveys. Don't bury the attendee under a mountain of questions. Cherry pick the most important ones and make sure answering it is easy for them. Ask three questions instead of 10. Give them three multiple choice options instead of five. Limit answers to one sentence instead of giving them a blank sheet to fill out. Keep it simple.

- *Add tough questions.*

This might seem like it goes against #2 above, but it doesn't. What we mean here is you should ask questions that will be tough to swallow for you and your team, instead of tough-to-answer questions. If you think your topics were boring, ask them why. If you had a huge tech issue, talk about it upfront and ask for the attendee's experience. It might be a bitter pill to swallow but getting frank and pointed feedback is important to both make your participants feel that they're heard. It gives you guidance on how to do better next time.

- *Incentivize the survey.*

Surveys seem like work, which is why we often don't want to fill out one. However, if you can incentivize people to fill it up, you'll get a better response rate. Give out a reward like a coupon or a freebie. Or you can give one lucky respondent a free pass to your next event.



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2. **Check your numbers**

*First, look at your financials***.** Did you stick to the event budget you planned for or did you pay for some unaccounted surprise expenses? It can't help if you've suddenly found yourself short-staffed or needing extra equipment on site. While sometimes you really can't avoid these expenses, it's best to have an emergency fund just for these things.

Maybe you actually hit your budget numbers and have a few dollars left over. Good for you! Now is the time to find out where you got those savings and if the quality you got in return wasn't compromised. It's worthwhile to take note of these deals as well so you can use these vendors next time.

*Next, if your event generated revenue*, how much did you make? Was it better or worse than last year, in absolute dollars? What were the big revenue earners this time around? Don't forget that revenue doesn't just mean entrance fees and purchases. It's also how many sponsorships and advertisers you were able to get.

*Finally, figure out the revenue per attendee*, if your event's goal was to generate Income. A simple equation of income less expenses then divided by your total attendance should do the trick. But the best way to look at this is to compare it to past numbers as well as industry values. Are you hitting benchmarks or falling short? And what should you do to increase this number?

3. **Look at your engagement numbers.**

Each event has its own goal but one thing in common among them is that they all want to create a highly-engaged audience. Engagement leads to activity which leads to word-of-mouth which leads to sales. There are a few ways to measure engagement for your event:

**How to do a follow-up meeting?**

1. **Set a specific date and location.** Treat the meeting like an event and add it to the plan for the event. The meeting should be done immediately after the event, if at all possible, so you can capture everyone's experience while it's still fresh.

2. **Only invite who needs to attend.** Not everyone needs to be at the follow-up but don't forget to invite key stakeholders including vendors and clients. For small events, the entire team probably needs to be part of it. For larger ones, you can limit it to leaders, managers and decision makers.

3. **Have an agenda.** Like any meeting set an agenda and stick to it. Everyone might be exhausted and having a strict timeline to follow makes the most out of everyone's time. Also, make sure to send this agenda to everyone as early as possible and assign a facilitator who can move things along so you don't get stuck.

4. **Focus on learning.** The goal of the meeting is to gather as much insight as possible and address issues. Don't point fingers but collectively come up with solutions instead.



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5. **Set next steps.** The meeting needs to produce some output so make sure everyone knows what they need to do next as a result of their learning's. Remember to document what each person needs to do next in preparation for the next event.

6. **Recap and celebrate.** After summarizing the meeting, it's important to also use this time to celebrate since everyone's earned it! Host the meeting at a relaxing getaway and make it part of the agenda to have some leisurely activities that your team enjoys doing.

## POST-EVENT EVALUATION REPORT

The event has come and go. You've paid your supplier, vendors and already says thank you to your attendees and speakers. However, your checklist is not yet complete without the ***Post-evaluation.***

After an event has done whether good or bad it's still important to take some time to conduct a proper analysis so that you can think all the things that you have done if its right or wrong or what should be improve next time.

*In order to approach a Post-event evaluation you will need to do this 3 things:*

1. **Collect post-event attendees feedback**

So here's how that works:

- *How to collect post-event evaluation feedback?*

You can get relevant post-event attendees feedback in a different ways. The most easiest way is to send out a post-event survey immediately after the event or you can also hand out hard copies during the event and if you have a lot of time and resources you could call up your attendees to do more in-depth questions. Also you can create a focus group if you have advisory.

- *Event feedback form sample questions.*
    a. Introduction and thanks.

    It is important to share gratitude for the attendees who came along to your event. And also you can tell them why are you doing and collecting a feedback.

    b. Select your event.

    Make sure if you handed the form to your attendees it is right and fits to the event that they came on.

    c. Over all rating

    Here you can ask your attendees a series of questions for you to know what are they thinking in your event and you can also ask their own opinion.

    d. Value money or time

    It is an indicator for you to know how much important your event to your attendees.



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e. Present or session evaluation

This is where you can gather feedback or any entertainment, presenters or session. Make this personalized base on your attendees behavior.

f. Venue evaluation

Here, you will know if your venue is easy to find and attractive to your attendees and the atmosphere and ambiance of your venue is good and relaxing.

g. Net promoter score

It will allow you to evaluate whether your attendees are detectors or promoters.

h. Thoughts and feedback

For qualitative answer leave some space where your attendees can write any thoughts.

*Example of event feedback forms:*

- Eventbrite feedback

This evaluation form offers lots of different methods to collect information. It allows attendees to draw on a diagram and to circle word.

- Jotform event feedback

This event feedback form is a good example of a form that attendees could answer. By only selecting ratings.

- General survey monkey event feedback form

This form is a general form which could be applied to any event with a questions such as "how organized the event? ".

- Wufoo post event

It makes it easy to the attendees to rank the food, venue, program etc. using the rating system.

**2. Review raw data**

You can get a lot by asking people a question but you should always think about your raw data of your event.

**3. Analyze success with stakeholders**

If your event has done you should dedicate some time for your team at least 1-2 weeks after the event has ended. It should not be late so that the memories still fresh and vivid in their minds. Also give your team a to reflect and prepare to have a better analysis.



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**Post-event evaluation**

- *What went well?*
  Start the meeting with a positive note. It is always important to recognize and celebrate the good aspects.
- *Things to improve*
  Nobody is perfect**.** Criticize the work not the people. And always remember, learn how to avoid and fix the problems. And the most important part is to learn how to listen to the ideas of your team and also learn how to grow as a team.

- *How to increase ROI (Return of Investment)*

  It is all about efficiency of time and allocation of resources.

**Reconnect to your core strategy**

The next stage of post-event review moves up from tactics and processes to one values and strategy. And always look at the two critical components:

1. *Did this event support our mission?* Always start by reminding everyone what is your mission.
2. *Does this event support for customers needs?* It is the time to review whether the event met the needs of your target customers.

**Evolve your event strategy**

Okay so now all you have to do is to looked back at the event you have just run, it is the time to reflect and start to look forward to your next event and this time we gonna start with the strategy.

1. **Our target audience -** The base of your strategy is the customers demographics. You need to base it on their needs.

2. **Our needs as an event organizer -** It is the top priority to cater your customers, but you can't forget about your own needs either.

3. **How do we measure our needs?** - Have you ever heard the phrase this days that "you are what you measure" so spend some time working out with the team and how you will reflect your key goals in terms of metrics and make sure that everyone is on the same page in terms of success.

4. **SWOT analysis for your event strategy.**
   - *Strength* it should be the companies attributes that give you a market advantage and difficult for competitors to replicate.
   - *Weaknesses* typically internal pain points that are within your control to rectify.



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- *Opportunities* one opportunity will be address your weakness, bur typically you should be looking at a broader market context.
- *Threats* it is driven by external factors such as the market.

**Translate your event strategy into goals**

Everyone of us needs something to aim for! So it's time to agree on some team goals for your next event, which will break into 3 parts.

- *Audacious goals*

  If you're really going to mould and put on exceptional events that can attract the ambitious and capable staff, then your goals should be big to motivate everyone.

- *Make those goals SMART*

  Have you ever heard the SMART goals before? I bet yes! Or should be ***specific, measurable, achievable, relevant and time bound.*** While it is important to have stretch goals they should still be SMART. So you won't chase the wrong things.

- *Milestone to track*

  Also it is important to break apart our goals into chunks so you can see incremental progress.

**Create a plan**

Cast but not the least in the event review process, you need to implement all of your ideas and brainstorming in a wonderful plan. How can you execute your strategy and achieve your goals?

*Think about this 3 things:*

- Resources

  Do you have enough manpower to execute your vision? Or do you have the right content management system? Or even budget?
- Growth tactics

  What specific ideas you need to grow your event? Should you focus on **email marketing, vloging or social media?** Here is the best time to do brainstorming for tools and campaign ideas.
- Improved preprocesses

  Can you put in place the work flows, reviews or sign-off processes or other effort that will help you sustain best practices and avoid bad ones?



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## THE EVENT PROFIT AND LOSS STATEMENT

### Event Profit and Loss

A Profit and Loss (P & L) statement measures a company's sales and expenses during a specified period of time. The function of a P & L statement is to total all sources of revenue and subtract all expenses related to the revenue. It shows a company's financial progress during the time period being examined.

The P & L statement contains uniform categories of sales and expenses. The categories include net sales, costs of goods sold, gross margin, selling and administrative expense (or operating expense), and net profit. These are categories that you, too, will use when constructing a P & L statement. Since it is a rendering of sales and expenses, the P & L statement will give you a feel for the flows of cash into (and out of) your business. This financial report may have several different names: profit & loss, P&L, income statement, statement of revenues and expenses, or even the operating statement.

### Why Prepare a P & L Statement?

One reason is the P & L statement answers the question, "Am I making any money?" It is a valuable tool to monitor operations. A regularly prepared P & L statement — either quarterly or monthly for new businesses — will give owners timely and important information regarding revenues and expenses and tell them whether adjustments might be necessary to recoup losses or decrease expenses. The P & L statement also allows outsiders to evaluate your ability to manage and use your company's resources.

The basic formula for the profit-and-loss statement is:

REVENUES – EXPENSES = NET PROFIT

- Revenue is the money you receive in payment for your products or services.
- Operating, or variable, expenses are the expenses that rise or fall based on your sales volume.
- Net profit margin or operating margin is the amount left when you subtract operating expenses from revenues.

The ability to evaluate and analyze your overall financial performance is complex but simultaneously ripe with opportunity to promote continuous improvement through careful scrutiny of your past efforts.



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# Final Examination

_____1. Something that happens or is regarded as happening; an occurrence, especially one of some importance.
_____2. The process of analyzing, planning, marketing, producing and evaluating an event.
_____3. It is the process of concentrating on and becoming expert in a particular subject or skill.
_____4. A type of corporate event that's organized with a target audience in mind and aims to impart highly relevant information to them.
_____5. The main aim of this kind of social event is usually to raise money for a chosen charity or non-profit organization.
_____6. An opportunity for professionals to learn from and connect with one another on a specific theme or topic on a more formal level.
_____7. In-house events aimed at boosting morale, improving on employee communication skills, and encouraging.
_____8. A particular branch of study or sphere of activity or interest and its synonyms are area and discipline.
_____9. This kind of corporate event is a great chance to showcase your latest product and introduce your brand to other businesses or the general public.
_____10. Tend to be a much more complicated event with multiple speakers and sessions spread across a number of spaces within one or more venues.
_____11. Described as a public assembly for the purpose of celebration, education, marketing or reunion.
_____12. The first thing to do before starting an event.
_____13. A key document that outlines all of the elements of an event.
_____14. The place where an event or meeting is happening.
_____15. An investigation of the causes of an incident, issue or failure.
_____16. A future event or circumstance which is possible but cannot be predicted with certainty.
_____17. A plan that will direct your activities in the case of any major or minor trouble. This plan not only works as a predictor of emergencies but will also help you to be equipped enough to cope with them.
18. In order to prevent trespassers from entering your event venue, you need to make appropriate event _____ arrangements.
_____19. An unstable or crucial time or state of affairs in which a decisive change is impending especially one with the distinct possibility of a highly undesirable.
_____20. False information that creates crises hurting the organization's reputation.

Essay:

Why is it important to gather audience feedback?
Discuss the SWOT Analysis for your event strategy.



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