



# UNIT-2

## The Event Planning Process

### Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Describe the event creation process and the phases involved in it.
- ✓ Understand the process of creating plans for events using milestones

## Unit 2

### The Event Planning Process

The best way to go about designing and organising events is to break them down into phases or stages. This way, the planner can tackle each phase more efficiently and in a timely manner from one stage to the next seamlessly.

#### 1. Initiating

The Event manager and the sales staff typically begin with initial phases of an event.

#### 2. Planning

This is the most important aspect of the event management process. This involves making plans that detail how things should progress up to the time the event is completed. This stage also requires planners and staff to be aware of the order of activities and include contingency plans to deal with potential problems when they arise.

#### 3. Executing

This phase involves putting the event plans into action. This phase doesn't exclusively occur during the event; it begins as soon as the plan has been put into action.

#### 4. Monitoring

This needs to be carried out throughout the duration of the event by event personnel who are required to observe how the event is playing out with guidance from the event plan.

#### 5. Controlling

Controlling is crucial as the event unfolds. It requires acting on observations made during the monitoring phase by taking decisions and making adjustments to the event plans in the face of the dynamic nature of event proceedings.

#### 6. Closing

It involves handing over the finalised 'product' to the client which requires clients' signature. It's the process of passing the finalised "product" to the client. In the Event Management industry, the "product" includes; the plans for the event, the performance of the event, and any correspondence done after the event.

## Clearing of the Event

### **Cleaning begins**

This involves picking litter, disposing it off at central location and doing the laundry.

### **Clear down small items**

Involves the removal of all equipment by caterer, technicians and other support staff.

### **Bump up equipment and furniture**

The removal of all equipment by caterers, technicians and media crew.

### **Cleaning and waste disposal**

Solid waste, recyclable materials are collected and tanks are emptied.

### **Removal of utilities**

Removing telecom wires and gadgets, electricity and gas supply lines as well as temporary water supply etc.

### **Removal of structures**

This includes the removal of ropes, tents and emptying of tanks.

### **Handover and site restoration**

Rubbish skips are removed from the site and final inspection is undertaken to ensure everything is in order. Damages are noted and repaired accordingly.

## Initiating

The event manager, sales representative, or event assistants may be required to undertake specific tasks to initiate an event. The extent of their involvement in performing these event initialisation tasks depends to a large extent on the level of experience and knowledge of the client. The initial contacts with a client may come in many forms. The type and length of the communication depends on the size of the event, level of experience the client has with event planning, and the way the Event Management Company is organised. The less experience the client has, the longer the pre-event meetings will be. Your participation in these meetings might be as little as taking notes and answering questions to as much as going on site visits and holding meetings with clients to explain the details.

### **Typical Timeline of Client Contacts:**

1. Email (Negotiations may not be necessary when dealing with experienced clients)
2. Phone call

3. Conference call
4. Meeting Pre-conference meeting (Pre-con Meeting)
5. Site visits
6. Follow up meetings
7. Pre-show meeting
8. Changes during the show approval
9. Closing communications

An RFP or initial conversations typically record this information:

- The contact detail of client
- The purpose or goal of the event
- The background of the client
- The event profile
- Benefit to gain from hosting the event
- How will the client be approached; directly or through a third party?
- Ways client will participate in meetings
- Identity of person who will makes final decisions
- Who should be chosen to approve changes to the event plan? Note down likely candidates
- Requirements of presenters (equipments etc.)
- The nature or type of event (whether conference or meeting and other specifications)
- The type of target audience to expect
- The number of staff to employ for the event

The duration for initiating an event is not fixed but varies depending on the level of your involvement as well as the level of assistance required by the client. It is not uncommon to have half day's meeting only to end up with a few answers to a host of questions. Nevertheless, the information obtained at the meeting is critical to planning a successful event.

## Planning and Executing

### Creating Plans

The ability to create comprehensive plans is linked to how much information was supplied by the client and the quality of it. The planning phase is meant to assist the event planners to device plans which will guarantee the overall success of the project and meet the objectives of the event.

**Scope Plan**

This involves getting to know the number of guests attending the event as well as determining the amount of resources needed to get the event underway. Of course, one would expect the event manager to maintain a balance between the budget and the expectations of the client.

**Cost Plan**

The client with the expert advice from the event management company needs to come up with the amount of money to set aside for the event. The planner then creates the cost plan which constitutes the budget for the event. The cost plan includes all cost of resources and the contingency costs during the event.

**Staffing Plan**

When the event schedule becomes available, you can start deliberating on the staffing plan. Creation of a staffing plan involves you listing all activities and the skills required to accomplish them. Sometimes more than one person may be needed for a particular activity at a certain time. This information about the number and nature of activities can guide you to determine the number of people you will need for the event and their respective schedules.

**Quality Plan**

Quality plans are designed to ensure excellent quality of service is provided throughout the duration of the event. You create quality plan by listing conditions needed to ensure the service will be of a high quality. For instance, you may assign a technician to all presenters during each session of the event. The technician with the skills to assist all of the presenters needs to be included in the staffing plan just described above instead of finding a new person to train for such quality assurance role. This way you get value for money.

**Communications Plan**

There needs to be a clear plan highlighting how communication activities should be carried out and all persons involved in the event planning and execution need to know about this arrangement or plan. They must know who to contact when changes in plans occur during the course of the event.

**Risk Management Plan**

Design a risk management plan containing a list of potential risks which may affect the event. Quantify and prioritize which ones have a high impact and outline steps to adopt to minimize or eliminate them

altogether. The key to the success of dealing with risks is to maintain continuous monitoring of factors which may lead to risky or dangerous situations.

### **Procurement Plan**

Knowing the quantity of resources required for the event is important to developing an effective procurement plan. The procurement plan outlines items that need to be bought or rented to get the event started. This plan also provides details of the mechanisms for procuring items and the date and time of delivery of items. Procurement plans provide the channel to compare costs of various vendors. They also require the signing of contracts, selecting the right vendors or providing and makes provision for closing contracts.

### **Schedule Plan**

No two events are ever the same, so schedules tend to differ for one event to the other. Whereas one event may indicate where to go and at what particular time to go, others will only list what is expected of the planner and the schedule is left to him/her to formulate. The schedule plan needs to meet the objectives of the all activities: to ensure everything runs smoothly and to meet the expectations of the client. In order to achieve these objectives, the planner need to use the other plans mentioned above as guidelines.

## **Monitoring**

Monitoring and controlling tend to occur more frequently during the planning and closing phases. It is important to understand that the phase structure is not fixed for you to follow sequentially in executing activities. Rather, it has been structured to guide you to organise and execute activities in an efficient manner.

## **Controlling**

Controlling involves managing changes to the original plan when a new item is added or an existing item is taken from the original plan. This addition or subtraction is done to control the outcome of the event. Successful management of plan requires:

- Working with the scope of RFP
- Checking to ensure all resources are available onsite
- Reviewing all schedules before event commences (i.e. operator schedule, equipment schedule, script, production schedule etc.)

## Live Events Project Management and Budgeting

### Conducting a Site Survey

The client's requirements and expectations guide the event planning team and/or the audio-visual technician to develop a list of equipment for the event during the pre-event meetings. The audio-visual (AV) technician needs to visit the site several times to collect important information by conducting a site survey to avoid making mistakes during the actual event. The audio-visual technician is required to produce specific equipment list from information obtained during the site survey. All equipment must meet the objectives of the client and should also be capable of performing all functions efficiently and effectively.

The initiating phase is the time to appoint someone who will be responsible for the approval of potential changes in the set up. The audio-visual technician needs to have the contact details of the appointed person to enable them decide on making prompt changes when the need arises. It helps to also have the standard approval procedure in place before the event starts. This procedure must be explained to all staff concerned. Here is the list of items to consider during site survey:

- Get in touch with the site management and obtain their contact details
- Find out about the rules governing site facilities
- Enquire about vendor contract requirements
- Enquire about liability insurance
- Ask for the loading dock procedure to assess it and conduct a physical inspection of the site
- Examine all access to the venue and the areas surrounding the venue
- Measure the dock height and any ramp grades
- Determine whether you will have need of ramps, dock plate or lift trucks
- Ask about dock hour restrictions and security
- Find out about time restrictions for trucks
- Measure elevator door dimensions and interior space to establish accessibility
- Measure all doorways and hallways to verify accessibility
- Request for a map of the building's interior to locate the ideal path to the event space and also to select the best route for bringing in equipment
- Find out about the work schedule of security personnel and inquire from them about how to access rooms
- Also inspect the venue to determine the ceiling height, the sight lines, location of fire exits
- Understand the arrangement for rigging point by talking with riggers
- Understand the working of lighting controls and how to operate the lighting system
- The safe power distribution path must be determined
- Telecommunication should be tested. Provision of additional telecommunication facility can be arranged with a specialist

- If survey forms have been provided by your firm then you need to fill them out. Otherwise take notes on things you observe at the site.

Site surveying is an important aspect of event planning which contributes significantly to the success of the event. It serves as a measure of how many equipment are required at the site and how to install them correctly. To ensure you not leave out any pertinent details during the survey, you need to create a comprehensive checklist like the one above so that you do not have to revisit the site frequently to seek for missing information.

## Site Survey Documents

### Onsite Personnel Contact Information

|                   |  |                   |  |
|-------------------|--|-------------------|--|
| 1) Contact Name   |  | 3) Contact Name   |  |
| Contact Job title |  | Contact Job title |  |
| Telephone         |  | Telephone         |  |
| Email             |  | Email             |  |
| 2) Contact Name   |  | 4) Contact Name   |  |
| Contact Job title |  | Contact Job title |  |
| Telephone         |  | Telephone         |  |
| Email             |  | Email             |  |

### Typical Facility Rules

- Consumption of alcohol not permitted
- No smoking
- Electronic recording devices are not allowed
- Tickets are not to be re-sold
- No selling of prohibited items at the site/venue
- Do not use inappropriate language or gestures
- Weapons are not allowed
- No animals except guide dogs

## Managing Client Expectations

- You need to make contact with clients to build relationships with them
- The planner should know how to formulate personalised questions to gain better insight into what the client really wants
- The planner's goal is to go beyond what clients expect but with the budget requirements

- Planner need to provide contact details for client to contact him
- The planner need to relay all good and bad news to the client to keep him/her updated
- You need to provide prompt response to client's queries
- Communication channels to client should remain open at all times from first contact right through the end of the event
- It is important to set limits and inform the client when you reach them.

Event planners have to maintain professionalism always by opening good and continuous channel of communication to the client and responding to all queries promptly and kindly. Even after the event, the planners need to maintain good communication with the client to obtain feedback on the event and to avoid the usual complaints of clients about event managers not communicating with them as much as they should after the event is over.

### Sticking to a Budget

As a planner, you need to make sure that you work within the agreed budget and resist the temptation to go all out to meet the client's expectation in excess of what has been agreed on. This can be achieved by having good communication and persuasive conversation with the client to tactfully point out the reality to him/her. The pre-event meeting provides the client with the opportunity to list all equipment he/she needs for the event. You on the other hand can quickly use your company's price list to assign a price to each item of equipment and then sum up everything to arrive at the final overall cost. Ensure your price matches the client's and inform the client about the overall cost before sending the invoice. This is a means of ensuring that their expectation is not astronomical.

### Scheduling

Your own schedule will form part of the overall schedule created by the client or the event organiser. Changes to their schedules must be reflected in your own schedule. This means that you must establish regular communication with the key decision-makers to monitor latest developments to help you to update your schedule to reflect any change or modification during the event. Schedules can be created with the help of the plans you have produced at the initial phase. Resources can then be allocated using the schedule to meet the expectations of the client as outlined in the plans.

### Creating Plans Using Milestones

List the milestones you must reach at the end of the event using all of your plans as guidelines. The plans may include the scope plan, cost plan, schedule plan, quality plan, staffing plan, risk management plan, procurement plan etc.

Examples of Milestones:

- Equipment arrives for concert in main auditorium
- Equipment set up in main auditorium
- Modifications to the stage completed

It is important to identify and document all activities that have to be executed.

For instance you may write the following activities you want to accomplish:

- Transport equipment to the venue
- Set up equipment
- Operate equipment
- Dismantle equipment and transport them back to the warehouse

The above points are collectively known as the work packages. The extent will differ from one event to the other depending on the scope of the schedule. For instance, if you want to schedule an event planning process and sales activities, you need to outline the work packages that are likely to be involved at this level before doing the schedule. Next, you break the work packages into smaller manageable chunks and put a time for their completion as part of the scheduling. Sufficient time should be made available to complete each activity with the available number of people at the time specified.

### Possible Scheduled Actives:

- Retrieve equipment from warehouse
- Load the truck with the equipment and convey them to the venue
- Unload the equipment and store them at the right location
- Install equipment in the proper rooms
- Test all setups
- Assigning roles to staff to operate equipment at specified times
- Assigning roles to staff to uninstall equipment at specific times
- Return equipment to the warehouse and unload them

It is expected that each activity listed will also include its attribute, i.e. the activities should have further details provided to provide a more complete picture of exactly what is expected to be done.

### Site/Venue Layout and Design

After carefully selecting the site for the event, you have to design a venue plan or a site plan having compass direction, a scale, and any popular landmark for easy identification. The plan can be used as an important aid

to planning when communication with suppliers, performers, emergency service personnel, event staff, stakeholders, guests and committee members. You may need to produce different types of site map to meet the needs of different groups involved in organising the event, including a simple one for guest, depending on the size of the site.

It would be a good idea to have a copy of the map on the event website to assist suppliers and delivery people in their duties. In many instances, most venues tend to have their site plans available to the event organisers showing the locations of venue facilities such as the fixed seating area, the stage area, toilets, etc. Flexible staging and seating are available for hosting event at conference centres with computer-generated views of different arrangements available to choose from. Outdoor and park sites require different approach to map design and layout of the site; the event manager and his assistant need to decide how and where activities should be placed at the site. Usually, a sketch of the site and experimental positioning of activities and facilities should aid the team to arrive at the most adequate placement. The general rule is to put similar activities together to achieve compact site layout.

### Important Factors to Consider in Creating a Site Plan include:

- Entrances for attendees and their proximity to transport and parking
- Good positioning of stage to allow for unrestricted viewing of performance
- Availability of power and water for stage areas, catering and toilet
- Closeness of entrance to parking and other transport facilities
- Provision of shade and shelter
- Adequate pedestrian lanes for free movement of people
- Identification of areas of high participant concentration to position revenue receiving facilities there
- Provision of site access for deliveries and emergencies
- Positioning catering close to shaded areas
- Location of toilet facilities in convenient places and away from catering team
- Waste disposal facilities
- Signs showing direction
- Directional signage where needed

### Selecting, Contracting and Managing Performers

Planners normally make arrangement to have 'headline' acts to attract people to the event because the performers are able to:

- Make the theme of the event attractive
- Make the event appealing to a large group of people
- Make the event lively and enjoyable

- Promote socialisation

## Checklist for Selecting and Managing Performers

- Identify the roles or functions that performers will serve at the event
- Decide on the budget for performances
- Research suitable performers and their availability, stage and equipment needs, fees, transport and accommodation costs
- Select performers that best fit the needs and budget for the event
- Negotiate carefully with performers or their agents matters such as payment and when this will take place, times and length of performances and their contribution to the promotion of the event
- Draw up a performance schedule including the times and length of all performances and rehearsals
- Request a written contract and make sure that it specifies correctly the details of the performance
- Take careful note of any special conditions or 'riders' before signing
- Issue a booking form to all performers, whether free or paid, specifying performance details, arrival/rehearsal times and any special requirements that apply to the venue or event
- Draw up a stage plan that meets the needs of all performers
- Communicate the stage plan and performers' technical requirements in writing to the stage manager, sound and lighting suppliers prior to the event
- From the performance schedule, draw up running sheets for key stage personnel and performers, and post them on the walls of dressing rooms backstage
- Provide adequate backstage areas and dressing rooms, including toilets, clothes racks, mirrors
- And refreshments
- Make sure that performers are met and welcomed on arrival
- Ensure that they are well briefed on their role in the event
- Supervise sound checks and rehearsals
- Introduce main performers to the compere and discuss how they are to be introduced on stage
- Thank them after the performance and ensure that they are paid promptly upon receipt of their

## Negotiating and Contracting Performers

The recommended steps for choosing the best performers who will give good value for money include the following:

- Watching potential candidate perform at other events
- Conduct research about performers using their websites
- Invite potential performers to auditions
- Contact local clubs for their opinion

- Contact private entertainment agencies

When selecting suitable performers for events, try to contract their managers who will be more than happy to supply you with their profiles or biographies as well as some of their previous works in audio or video formats. Also ask for fee details as well as the specifications sheets for their stage requirements. This information will assist you pick the most suitable performer(s) at an affordable who can help meet the objectives of the event and who are willing to charge reasonable fees per your budget arrangements.

There are several key items you must look out for when it is time to initiate contract negotiations with the performer's agent. Be sure to state unambiguously what you require from the performer in the contract. Also discuss the fee and the mode of payment. Payment may come from a proportion of ticket sales, a flat fee or mix of both. The norm is to provide an advance payment of a portion of the total amount of the fee and the remainder after the event. Sometimes the performer may require provision of 'riders' as part of the contract. 'Riders' are the services the performer expects the event manager or planner to provide for free in addition to the contract fee. These include transportation, accommodation, hospitality, etc.

A performance schedule should be created to include agreed format for rehearsals and sound checks. The role of the performer in promoting the event in the media in the lead up to the start of the event must be clearly specified in the contract. Conventional contracts are normally provided by the agent of the performer highlighting the terms and conditions and the responsibilities of the event manager and the performer. You need to read the contract carefully before signing on the dotted line. If the agent of the performer is unable to supply a contract, you may have to create one which specifies all of your requirements including the time, date and duration of the performance. Also include in the contract, the insurance details and the mode and time of payment as well as providing details of liabilities for cancellation of the event. Tax issues should also be discussed and sorted at the most convenient time.

It is a good practice to issue a booking form to the performer. This form outlines what is expected of the performer and other guidelines and conditions to follow when performing at the event venue. The booking form may also be provided to community performers as evidence of their performance at a community event.

#### **Conditions and Guidelines that Might Apply to the Event include:**

- Providing rules and ensuring adherence to restrictions and preventing unacceptable content and behaviour
- Provision for public liability insurance
- Making parking arrangements
- Making repairs to damaged properties
- Making arrangement for cancellation or postponement
- Making arrangement for sound check and rehearsal
- Provision of contingency plans to deal with bad weather

- List of facilities to be provided including rooms, mirrors, ironing board etc.

### **How to Stage the Event**

During the hosting of events, a stage is provided for the performer so that all participants at the venue can get a good view of the performance. Staging also helps to provide a safe working environment for the performers. To enhance the performance even more, lighting and sound are provided to create a good mood and atmosphere at the venue and particularly on the stage.

The concept of staging may be useful on occasions such as a schools awards day or a prominent entertainment event which requires different groups of performers such as singers, dancers, variety acts etc.

A typical simple staging may require a raised dais and a loud speaker. Complex staging on the other hand requires a larger stage, several loudspeakers, sound systems, lighting systems and sophisticated equipment. Regardless of the nature and size of the event, staging has a strong influence on the success or failure of the event. You need to pay careful attention to every detail and invest significant time and resources to ensure that everything works according to plan, especially with regards to staging. Excellent staging has the ability to enhance the theme and to communicate the essence of the event to participants besides providing the usually high quality entertainment.

Some venues provide the stage and equipment while other venues such as outdoor venues may require you to construct the stage and supply the necessary equipment such as those for sound and lighting. Scaffold and wood flooring may be used to construct stages. Nowadays, it is not uncommon for people to rent mobile stages or to use the back of trucks to stage events. Sound and lighting technicians are required to operate sound and lighting equipment. You, as the event manager, only need to have familiarity with the terms associated with these equipments. For example, you need to understand terms such as:

- Single and three phase power
- Mixing desk
- Speaker stacks
- Old back speakers
- Lighting trees
- Lighting gels
- Spotlights
- Par cans
- Lighting trusses.

The event manager needs to have a chat with the performers to understand their exact requirements. To ensure everything goes according to plan, it is instructive to prepare a stage plan to guide the stage crew members to perform their duties effectively. The stage crew would be expected to provide the right equipment to the performers, ensure that there is uninterrupted supply of power, make adequate provision for backstage area,

ensure the availability of dressing rooms and manage rehearsal times. Creating a stage plan and a run sheet will serve the functions just described efficiently to ensure everything works to the expectation of the event manager and the client. Sometimes if the workload is huge, the services of a stage manager may be acquired.

**When dealing with stage issues, the event manager will have to undertake the following duties:**

- Create a programme for speakers and performers
- Order the sequence of performers and speakers for contrast and high impact
- Arrange for proper stage decorations such as barriers, props, banners etc.
- Assess the size of the event to determine whether or not a stage manager would be required. In case the size of the event warrants a stage manager, you will have to discuss the subsequent steps below with him/her
- The event manager will have to determine the stage requirements of each performer and make arrangement for each of them. The setup, stage area and equipment may differ from one act to another. These should be considered in the stage plan.
- The stage plan helps to determine the size of the stage to use. You may be required to add extension if an already existing stage is too small or you may be required to modify the site plan to match the stage provided.
- Additional equipment needs may be taken care of by contacting potential suppliers for a quote. Ensure provision for backup items such as generators, extra light bulbs etc.
- Adequate staffing for operating equipment and supervising and managing stage activities need to be provided. Some firms may provide operator for sound and lighting systems.
- Adequate provision of support systems such as dressing rooms, refreshment for performers etc. should also be provided.
- Stage safety should be carefully considered and measures put in place to ensure a safe working area. This includes taping and sealing cables and providing onstage security.
- Complete schedule for all aspects of staging needs to be created and need to be included the arrival of equipment, setting up and testing of equipment, rehearsal, the actual event and uninstalling the equipment at the end of the event. Separate run sheets for performance, equipment operator and stage management have to be created with the required details provided according to the requirements of these categories.
- Make yourself available to welcome performers and important guests and be ready to deal with any crisis or emergency situation.

### Further Reading:

- ✓ *The Complete Guide to Successful Event Planning By Shannon Kilkenny*
- ✓ *Event Management: A Professional and Developmental Approach*  
*By Greg Damster, Dimitri Tassiopoulos*