SO YOU WANT TO RUN AN EVENT?

A 9 STEP GUIDE TO EVENT SUCCESS

Includes FREE tools, downloads & top tips!
So You Want To Run An Event?

Whether you’re organising your own event or you’ve been asked to organise an event; whether you’re looking forward to organising it or would rather have root canal surgery, this 9 step guide will help put you on the path to success.

To be fair, some of what you’re going to read will sound like we have a PhD in the bleedin’ obvious.

Maybe.

Common-sense?

Definitely.

But it’s amazing how often common-sense isn’t commonly applied. So, even if you’re no newbie to organising events, you might find a nugget or two in here to help refresh your event mojo.

The 9 steps to event success are:

Step 1: Know Your Objectives
Step 2: Know Your Budget
Step 3: Create an Action Plan
Step 4: Select a Venue Partner
Step 5: Create Your Programme
Step 6: Select Your Suppliers
Step 7: Shout From the Rooftops
Step 8: Manage the Big Day
Step 9: Ask: How Did We Do?

We have learned a huge amount since we opened our doors in 2006. We’ve made mistakes, resolved mistakes, been on the end of mistakes and, just as in life, it’s in the mistakes that you learn the most. We’ve even included some of our mistakes in this guide so that you won’t have to make them all over again. We’re not proud of them but we won’t hide from them.

So in a strange kind of way, we find ourselves operating in a world where we desperately try to eliminate mistakes happening, whilst embracing what they can teach us when they do.

This guide is a compilation of advice based on such teachings.

If you are looking for a blueprint for your event, this isn’t it. Stop looking - it won’t exist.
However, if you are looking for some guidance on how to deliver an outstanding event; if you just need a helping hand to navigate through a foggy and confusing event landscape, then this guide will help you visualise, plan and direct you on your event journey.

Before we set off, it’s worth just stating that there are obviously many different types of event and we couldn’t possibly cover every variable for every type. So not everything you read in here may be relevant to the specific event that you are considering.

That said, there are many common elements, regardless of whether you are organising a Christmas party, a conference, a launch, or an awards dinner.

**Also look out for the ‘Happy to Share’ button**

At various points throughout this guide there are references to briefs, checklists and other tools that we’d recommend you use to help you plan and deliver a successful event. You may already have some of these but if you’re struggling to know how to set these up, then feel free to download an example.

Whenever you see the ‘Happy to Share’ box, just click on it and it will take you through to an example of whatever is being covered. The one above is just that - an example, so it doesn’t go anywhere. If you’ve just clicked on it a few times and discovered that it doesn’t go anywhere, all is as it is supposed to be. Stop trying. Life is too short.

**OK , let’s not lose any more time - you have an event to organise...**
And the challenge is: working out the ‘whatever that means to you’ bit.

You will want people talking positively at the event; you may want people sharing their experiences with people who didn’t attend the event and you will definitely want people to have got all that you had promised that they would get out of the event.

To be able to do this you need to be able to fast forward to after your event, look at it (and its outcomes) and know what a successful event looks like.

In short, for an event to be successful, it needs to hit its objectives.

So there we have it. The first thing you need to establish when you are organising an event is; why do we need an event and what do we want to achieve from it?

It sounds straightforward but you’d be amazed how often in corporate-land events are organised for ‘justifiable’ reasons such as…

Because we have the budget - if we don’t spend it, we’ll lose it…

Because we’ve always had a summer party…

or, as is increasingly the case

Because I’ve been asked to do it on top of my day job…

STEP 1: KNOW YOUR OBJECTIVES

IT GOES WITHOUT SAYING THAT, WHATEVER THE EVENT YOU WANT TO ORGANISE, YOU WILL WANT IT TO GO WELL (WHATEVER THAT MEANS TO YOU).

THE FIRST THING YOU NEED TO ESTABLISH WHEN ORGANISING AN EVENT IS; WHY DO WE NEED AN EVENT AND WHAT DO WE WANT TO ACHIEVE FROM IT?”
Here’s a scenario: there’s an organisation, charity, club or association that maybe relies on ‘good-will’ revenue in order to survive. So often you will hear someone say:

We need to arrange a fundraising dinner…

OK. Maybe.

But given the amount of effort, physical and mental energy (not to mention the leaning on people for favours) it can take to organise these things, doesn’t it make sense to just press pause, draw breath and think about a few things for a while?

- What level of funds are you aiming for?
- Who is the target market?
- Is it about raising funds on the night or future relationships?

Coming back to your event - ask what it is that you need out of this event.

Whatever answer you come back with, challenge yourself again. Keep going until you have a very clear set of answers. These will become your objectives (you might even come to the conclusion that an event isn’t the best way to achieve them!)

Not all objectives will be easy to measure or even be achievable during or immediately after your event. You may have to wait weeks or months to see if those relationships have been built; sales have risen, or newly merged companies have bought into the new common goal. However, if at all possible, you should try and include some measurable objectives.

But, only by setting objectives, will you be able to hold a mirror up to your event outcomes and have something to compare against them.

If we don’t put the effort into this first step, we will be running around at mach 2 with our hair on fire without actually knowing if we are making progress or not. Not Good Scenario #1.

A useful exercise at this stage is write yourself a brief for the event, as if you were going to ask someone else to come up with ideas and manage the project. You can cover all of the nuts, bolts and basics such as date, numbers of attendees, location and the objectives you have just established.

But you could also include the rationale for the event (what’s the context/why it is needed), your vision for the event, how it might look, what you definitely don’t want to see at the event, perhaps list what has or hasn’t worked before.

This, along with your objectives should give you a really solid framework on which to build your event. If you are unsure what to include in your event brief, we’re happy to share. You can add and delete sections as you see fit to make it work for your specific event.
It seems that there are two schools of thought when it comes to approaching event budgeting:

1. Have a figure in mind or that has been made available, and make the project fit it.
2. Have no figure in mind, but price up the project as per your vision, and see what it comes to.

Neither way is absolutely right or wrong but in both cases, the real challenge is not so much about managing the budget, it’s about managing your own expectations (or perhaps someone else’s).

The figure in mind approach may mean that you will need to revise your objectives, or your initial thoughts on how you might achieve them. Having a number in mind is absolutely fine. If that’s how much there is to spend, that’s how much there is. If the budget is generous, you may not have an issue in funding an event that will meet your expectations. However, very few event projects have this luxury.

From the outset, it’s important to be realistic about what you can achieve with your budget.

**Step 2: Know Your Budget**

**From the outset, it’s important to be realistic about what you can achieve with your budget.**

We were approached to organise a four-year-old’s birthday party, with a budget of £10,000! Now that seemed insane to us, but the crazy part was that the doting father couldn’t understand why we couldn’t get some Manchester United first team players to attend, within the budget.

Yes, £10,000 is a lot of money. But it’s nothing compared to the ‘get-out-of-bed’ payment expected by premiership footballers.

Outwardly the budget was sizeable for the event, but was dwarfed by the client’s expectations.

Try and align both of yours.

If you have no figure in mind, but then price the project up, come to a figure and think “Whoa! – that’s expensive”, you have to ask yourself, “expensive compared to what?” You had no figure in mind to compare it to. If the figure is simply more than you want to spend, then it has been a useful exercise and you are now in scenario one. Allocate a figure based on what is available and work out what can be achieved.

Alternatively, if you have the resource to fund whatever figure you come to, then you have a well-costed budget based on accurate quotes from suppliers. Happy days.

Just a note of caution here. Don’t fall into the trap of looking for the ‘WOW Factor’. Especially if you are already trying to sweat your budget like a Grand National winner. Asking for the WOW Factor is actually the most glaring symptom of lazy thinking.

Firstly, what does it really mean? What are you actually asking yourself for... or being asked of, by someone else? Is it a feature of the venue, a particular calibre of speaker, an activity? If you can be more specific, do so... this will then identify sub-targets and goals that could be explored. Carry out research to see if these sub-targets can be achieved within the current resource available (budget, time, staffing etc).

Secondly, if you mean that you have very little budget but really want to put on a lavish event...why should you expect to have a Ferrari on the drive when you only have the resources for a VW?

There is nothing wrong with a VW. It will get the job done - it’s the journey you take it on that matters.
You may be wondering how you actually go about creating an event budget. Apologies for the egg sucking advice to more seasoned event-types, but the truth is that there is no hard and fast rule.

The budget is always going to be fluid as ideas for inclusion come and go but the best way to start off is to envisage yourself on your attendee journey. Picture yourself going through everything that they do, see, hear, smell, taste and experience.

So you might need to think about how they are invited and respond; do they make their own way there or is travel put on? How are they greeted? Are they given anything? What do they see in the main event room? Are there other event rooms?

Keep going until you have visualised everything and then think about some of the things that might incur costs for you behind the scenes. What expenses might you incur: postage, mileage, office printing, packaging, even bank charges?

Going through this process will also help you generate your ‘Action Plan’ covered in the next section.

As mentioned at the beginning of this step, you will probably need a budget for approval and once approved, nobody gets a pat on the back for a budget that creeps upwards. With the best intentions in the world, fluctuations in some aspects of your quotes will mean that some prices might increase. **To hedge against this, always include a contingency element in your budget.**

This buffer will help you absorb those little shocks and fluctuations without actually having to increase your overall budget. If you don’t need it or only dip into part of it, congratulations! You will have delivered your project under-budget!

**NOTE:** The contingency isn’t there to cover additional requirements - those would be enhancements to the original brief. The purpose of a contingency is to protect the budget from difficult to identify fluctuations - not to fund mission creep!

Finally, (and again, apologies for straying into egg sucking territory) make sure you consistently use figures that exclude VAT if it’s a business project and you are VAT registered; and include VAT, if it’s a private project. Suppliers, particularly venues, sometimes don’t break the VAT out and you may end up building a budget that is a mix of the two.

**TOP TIP!**

Exactly how much to allocate in your contingency is the killer question. It would be easy to add an arbitrary 5-10% on top, but what would it be based upon?

The most meaningful way is to go through each cost and try and estimate how much each might rise by and why. (You will need to talk to your quote providers about the level of potential rise and why.) Then try and consider how likely it is that those price rises will happen on a percentage basis…and multiply the two together.

For example, if your supplier feels they are happy with their quote but at the most, it may increase by £500, subject to seeing the event room, consider their confidence based on the accuracy of the information you have given them.

They are professionals - they should know their job. They are confident, so the risk looks low. You might want to apply a 20%-30% chance of the increase happening. This generates a contingency value of £500 x 0.3 = £150.

Carry this out for each cost in your budget and you will at least have a meaningful and calculated contingency.
Step 3: Create an Action Plan

Sometimes, looking at an event project for the first time can feel like trying to start a jigsaw puzzle without the picture.

The trick is to use the objectives and brief that you created in step one to create the picture; the vision of what your event should look and feel like; and to then start taking small steps towards it.

The journey of a thousand steps can sometimes start with much procrastination, some degree of anxiety and audible gnashing of teeth, but to get going, at some point, you are going to need an action plan.

There are dozens of project management software packages available online but you can probably do everything you need with the event organiser’s old friend, the spreadsheet.

There are really three aspects to creating the action plan:

**Part 1: Break your event project down** into each broad component part. Don’t worry about detail at this stage, just identify the big chunks. So if you are organising a conference, start with categories such as delegates, speakers, sponsors, venue, audio visual etc and put them in the first column of your spreadsheet.

When you think you have identified all of the major elements of your event, take each one in turn and break it down again into all of the tasks that you feel are associated with that element. For example, under ‘delegates’ you might have:

- marketing/communication of the event
- management of the RSVP/invitation process
- management of the booking/payment process
- joining instructions
- lanyard/badge production
- creation and collation of delegate packs
- on the day registration
- evaluation processes

"The journey of a thousand steps can sometimes start with much procrastination..."
From here, you may be able to break things down further still. For example, under ‘marketing/communication of the event’ you might be able to expand additional sub tasks such as:

- create email template/design
- copy to be written and approved
- establishing who the invite is from
- recipient email addresses
- a facility to mass mail
- building a micro website to capture registrations

Take your time during this step. There will be some overlaps between some parts of the project but get it all down anyway. If you can get someone else to help you breakdown the project, even better. In this instance, more is definitely more!

Congratulations - you have your first project list! (And there’s nothing more satisfying to a fully-fledged event organiser, than a nice long, comprehensive list - apart from crossing those things off!)

There will always be things that crop up and inevitably projects evolve but at this early stage, by following this process, you will have covered off 85-90% of your project requirements. Effectively this is your ‘to-do’ list.

**Part 2: Create a timing plan** so that you know what has to be done, by when. The benefit of this is two-fold: firstly it helps you prioritise and secondly, if you have a specific date for your event, it helps you work out if, realistically, you even have enough time to deliver the event! If you don’t have a specific date it will at least give you an idea of how long you will need to organise your event.

The easiest way to create the timing plan is to use the list you have already made and then create a Gant Chart by allocating each of the columns to the right of the 1st column as a 1 week period. You can then work out how long you will need for each part of the project and block it out in colour.

We mentioned about prioritising and this is essential. There will be no email invites sent out unless you have approved copy, email addresses, an email template and perhaps a micro website to receive the RSVP! As such, it’s worth dragging these actions into the order that they need to happen.

We’d all like more time than we need to get a job done, so a good rule of thumb is to initially be generous with the time that you allocate for each aspect of the job. You can always revise this at a later date. In reality, things may complete sooner than you plan but equally, approvals may take longer; supplier answers may be delayed or attendee responses may be slower than you anticipate.

"Give me six hours to chop down a tree and I will spend the first four sharpening the axe."

Abraham Lincoln
When creating your timing plan, don’t forget to allow for post event activity such as the evaluation process or having some form of ‘wash-up’ meeting, where feedback, successes and learnings are discussed.

**Part 3: Create a team** to help you deliver your event project. You may be the lead organiser or have been appointed to manage the project but whoever said ‘many hands make light work’ had probably just arranged a three-day conference!

Ideally, whole portions of the project should be kept together and allocated in their entirety to specific team members. For example, all things ‘delegate’ should stay with one person, all ‘presenter contact’ stays with another. Allocate people’s names to each of the component groups on your time plan.

If this level of support isn’t available but it’s clear that, on your own, you will not have the capacity to manage the volume of work required, perhaps there is a case for revising the objectives and expectations or for drafting additional help in. Volunteers are always preferred to conscripts, but ultimately they need to have a head for detail and a strong work ethic!

It may be that your project doesn’t warrant a lot of additional support. It would still be worth lining people up to help check copy that you’ve written, for opinions on designs and layout or perhaps to help on the day. (You will almost definitely want support on this last one!)

Once these three parts have been completed, you will now have your roadmap: you know what has to be done, by when and by whom.

If you are struggling to set out your action plan, we’re happy to share!

Click on the button; download a generic plan and feel free to tailor it to your own requirements.

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**Top Tip!**

You may already have some idea of what you need to do, don’t want to waste time and just want to crack on with it. And true – completing this step will mean having to invest some time (sometimes a lot of time) drilling into the detail of the event and asking lots of questions.

Sometimes though, you’ll find that you won’t be able to answer those questions and that blank is as valuable as an answer because you have just identified a gap between the floorboards!

If you don’t invest in a plan now, details can easily slip between these gaps and create problems for you later on and worst of all – at the event itself. Not Good Scenario #2

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www.assuredevents.com
**Step 4: Select a Venue Partner**

*Your venue choice can make or break your event before you’ve even sent an invite out.*

If you are using your own premises for your event, then you may be able to skip this section and dive straight into Step 5! The caveat here is that you will still need to double check that you are able to do what you want to do on your own site in terms of numbers, catering, fire drills, insurance etc.

If you are holding the event elsewhere, you will need to create a brief summarising your specific requirements, which can be emailed to your various potential venues. This will be different to the brief that you have created for yourself in step one. Whilst it will still be created with your event objectives in mind, at this stage you are looking for more of an operational response.

The key information you need to provide potential venues with to allow them to respond to your requirements, will be along the following lines:

- dates
- guest numbers
- catering requirements
- room hire (single room, breakout space, external space)
- audio/visual requirements
- any accommodation requirements
- transport/parking

You should also ask for plenty of images of all spaces: accommodation, public areas, bars, private hire space.

Ask what, if anything, the venue feels it could offer over and above your stated requirements that would make them stand out from other venues you have contacted. A low or no cost item to them could enhance your event significantly. For example, access to a terraced area, an accommodation upgrade, views over a rolling landscape…

Depending on your event requirements, some venues will quote separate costs for room hire and catering whilst others may offer a day delegate rate (DDR). The DDR may include lots of extras that you may not even require so it is worth asking for both as either one can sometimes be more cost effective.

In terms of where to send the venue brief, you will have already established in your original project brief the approximate location or region where you want to hold your event. This may be based on a drive or travel time; a specific city or an easily accessible area for your attendees to reach.

[www.assuredevents.com](http://www.assuredevents.com)
By gathering the information above you should be able to compile a shortlist of about 3-5 venues. Be sure to ask your short listed venues to provisionally hold the date and get a confirmation in writing. You don’t want to lose out on what could be your preferred venue because someone else has sneaked in under the radar. Having secured your venues for the date, you will need to carry out your recce to really see the lay of the land.

**What the deuces is a recce?!**

Your recce is your site visit to assess first-hand what the venue has to offer and to clarify any outstanding questions you have. But it’s a whole lot more than a regular ol’ site visit.

Don’t underestimate the power of the recce and don’t just visit your preferred venue. Visit all that have made your shortlist. You can sometimes have niggles about a venue, but not be sure why. The recce will usually scratch that itch one way or another.

Do you need a venue to stock your products? Have they been honest or just told you what you want to hear just to get your business? What about the location? Is the Square outside a favourite haunt for sleeping drunks? Is the venue clad in scaffolding and has a daily walkway of dust and dirt running through the main entrance? The other event they mentioned that will be on at the same time as yours; will the two of you really not bump into each other?

We have discovered all of these issues and probably only go with our first choice venue about 20% of the time following the recce. The majority of venues are very honest in terms of the information they will provide you. But even then, you may just find out that your second or third choice is more suitable for reasons not even realised until you have visited them all.

So don’t think (and don’t allow others to think) that a recce is a nice little jolly out of the office to enjoy a free coffee and perhaps some cake. The venue can totally compromise your ability to deliver your event, or they can amplify its success tenfold.

Try and absorb as much as possible at every venue you visit. After a while sometimes one venue can blur into another. Try and keep a checklist of all of the aspects that you want to compare and photograph everything! (Access, hanging points, poster boards, chairs, communal areas…)

Struggling to know what to look for? No worries – here’s a recce checklist that you can adapt for your event. With our compliments. FOC. Gratis. Just make sure you take it with you!

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**A Short Story**

We had booked a venue for two evenings as a late-night bar for a conference for 250 people. On the afternoon of the second day, we went to visit the venue to start setting up our entertainment and room dressing to discover trades people ripping the bar out for a two week refurbishment!

The venue initially denied that the room had been booked out for the second night, but were proved wrong when we presented them with their own function sheet detailing the booking. The venue was barely bothered and the cold hard facts were that the bar couldn’t be used and we still had 250 people to water later that night.

Our task was to secure a venue for 250 in the local area...and we had about two hours. This we did; the clients were very understanding and had a fantastic evening and enjoyed a high level of service from a bar team that had not expected that level of business on a mid-week night.

The original venue had offered great value for money, but had been challenging from the beginning. Had it not been committed to by the client, we would never have recommended using it in the first place.

Your venue should be your partner; willing and proactively helping you achieve your goals. Not a source of running battles and compromising your ability to deliver your objectives.
Again, it sounds like common sense but, if at all possible, don't make your final decision on cost alone. What level of service have you received so far? If they have been slow, inaccurate or passed you around the houses when they are trying to win your business, how will you be treated once they have your business?

More importantly – how will they behave on the day?

This is especially true when you consider your catering requirements. A poor meal can sometimes be recovered by excellent service, but it seldom works the other way around!

Talking of catering, don’t scrimp on your catering budget! Event attendees are becoming increasingly discerning about their food, whether you are providing a buffet and refreshments or a four-course meal. A good chef should be able to think beyond the average butty and pork pie.

It’s not about spending huge amounts more. Food provenance is very important to people so tell them where it’s from. Also bear in mind the issue of ‘food miles’ and that there is a movement towards promoting local produce.

To select your ideal venue partner, you will somehow need to balance the equation between the suitability of the venue facilities, the cost of those facilities and the level of service you are likely to receive.

Be prepared to negotiate. You may be able to win yourself some discount or added benefits such as upgrades or additional room space. But also be prepared to compromise on your own expectations if need be. You are looking for a partner after all and seldom does Mr or Mrs Perfect arrive with a fully ticked checklist. But that doesn’t mean you shouldn’t be fussy.

Once you have selected your venue you will be presented with a draft contract to sign.

**Do not rush into signing this!**

It is a binding contract that will incur cancellation fees if you want to reduce numbers significantly. Fully review all cancellation policies and payment schedules. On that, it is worth reducing your minimum numbers to a level that you are comfortable will ACTUALLY attend. *Increasing numbers is always easier than decreasing them!*

This isn’t an opportunity to minimise your exposure to financial risk by trying to drop the contracted number of attendees to 10 when you had enquired about 200 and think about 180 will attend! Venues have an asset to sell (space, food & beverage) and they will require minimum numbers in order to make the sale worth their while. So expect most large spaces within venues to attract a hire fee AND a minimum number of attendees at a fixed price per head.

Whilst checking the venue’s cancellation policy, make sure you are clear about what they are including in their calculations. Sometimes it’s not just what you had contracted to. Sometimes there is a clause stating that a percentage of anticipated drinks sales will also be charged, or that a set service charge will automatically be added to groups over a certain size. (Beware too, if a venue states that service charges are discretionary - they may only apply that policy to groups under a certain size.)

Some venues want a significant deposit up front and others are more relaxed, so be prepared to start financially committing to your event project early on, but only do so when you are completely happy that you have understood what you are committing to.
The content is your product. This is what your event is all about. Ask yourself what content is needed to achieve your objectives. Budget clearly has an impact on who you can approach to speak at a conference or dinner, or what level of entertainment you can have at say, an annual awards ceremony. But the content must be on brief. The key here is to do as much research as possible. Speakers, hosts and entertainers can be very difficult to judge without having seen them in action, so word of mouth recommendations are always the best starting point. However, if this isn’t an option, YouTube is your best friend here. The good ones will have been captured on film at some point. Also, it’s usually a good sign if they are very active on social media. Have a look through their posts and consider who has mentioned them and the frequency of their interaction. You will probably be able to see feedback, engagement with recent audience members or if they are happy to share some of their content. If they require a fee, that is also a good sign, although not a guarantee that they are any good! It means that they can COMMAND a fee. A free speaker or host may sound like a great idea to your inner-accountant but it is more likely a sign of inexperience (unless of course you are ‘besties’ with an A-lister and they are doing it as a favour).

Also, when you approach these people, ask yourself “how interested are they in my audience”? If there is lots of positive footage, they are very active on social media, they want a fee and they are asking lots of questions, seeking to get some degree of understanding and insight into your audience and objectives, you can be reasonably confident that you are considering a reliable and professional speaker, host or entertainer.

Many years ago we had booked a keynote speaker who’s career had taken off after appearing on a TV business programme. He was right on brief for the audience who were all small business owners eager to learn from someone who had made it over the line. We had checked that he had no other filming commitments around our date and had paid our deposit to secure his services. Early on the day of the event, he phoned to say that he was on holiday in Jamaica and had missed his return flight! We wanted to know why he hadn’t told us he was out of the country right up to the day before our event. Apparently it was our fault because “we hadn’t asked”! We certainly wouldn’t have secured his services had we known, given the possibility of a delay, never mind simply missing the flight! We (very!) quickly found a replacement but a lesson was learned. Now we always research around a speaker’s diary and other commitments, as well as being in regular contact the weeks and days prior to an event. Being let down by a speaker (particularly one that has been billed to draw the crowds in) is one of the most stressful hoops an event organiser can find themselves being pushed through!

We have the t-shirt and it’s on sale in the foyer!
A known name does not guarantee that they will click with your audience. The highest paid speaker we have ever hired was for a gala dinner. He was a well-known TV personality and on paper, (not to mention on TV and on YouTube footage from other gala dinners) he was bang on what we were looking for. But he was also the lowest rated speaker we’ve ever had following an event evaluation. He showed no real engagement or interest in his audience; he hadn’t tailored his talk; he was clearly very tired from filming in the daytime and he dashed off immediately afterwards, avoiding other guests!

If your event is more entertainment focused it’s a question of working out what would and wouldn’t appeal to your audience, at any given point in the event. Having a live band might be a great addition to your event, but perhaps not at the drinks reception when people are enjoying a chat. On that, don’t just pick a band or form of entertainment simply because you like them or they are a good mate of yours.

Don’t be one of those organisers who uses an event as your personal toy; thinking more about your own enjoyment rather than your audience (unless it is your toy of course and you’re organising your own party!) Even then, don’t assume that because you are of a similar age to the audience that your music taste will go down well!

You have to put yourself in the mindset of your audience - think about what they will want to get out of the event.

Whether it’s speakers or entertainers, book as early as possible. Be aware that if you are booking the kind of names that appear on television, then be prepared for them to cancel in order to fit in, a hitherto unknown, filming schedule. Likewise, if you have a politician booked on to your programme, they too can cancel at the last minute, depending on what is bubbling up in the news around the time of your event.

Your programme isn’t just about speakers and content though, it’s about timing too.

Your attendees need time to absorb conference sessions; to enjoy refreshment breaks to recharge and chat; they need time to get from one session to another without breaking into an uncomfortable sweat. If you are organising a dinner, you need to consider the transitions between arrivals, drink receptions, welcomes, food service, entertainment etc. If your content and programme is your product, then it needs to be a well-oiled machine in sync with the rhythm required by your audience.
Although this is your project to design, develop and deliver, you know that you can’t do it on your own. Regardless of what your event is and what your objectives are, in addition to hosts, speakers and entertainment, it is highly likely that you will also need to draw on a whole host of other suppliers.

You and your suppliers are your team, and just as teams can win or lose depending on the abilities and attitudes of individual team members, your event will only ever be as good as your suppliers can make it - and you are responsible for picking your suppliers.

Sometimes, what you need may feel like just a commodity item (like chairs, linen, tables) so shouldn’t it just be a case of going for the lowest price? Well maybe, but assuming you haven’t worked with them before, have you seen samples? Where else do they work? What other venues have they worked at? Who are their clients? What kind of feedback do they have on social media?

Website photos can be very deceiving! They may have been taken years ago and items are now well worn and shabby looking...but not in a chic way!

Often your venue can provide plenty of additional items and services (such as tables, chairs, linen, stationery, projection screens) or it might be the kind of venue that rents its space on a ‘dry-hire’ basis. This kind of venue is often described as being a ‘blank canvas’ (as in, you can do what you want with it in terms of look and set up).

This is true and it may be bang on brief for what you need. Be warned though that with a blank canvas it is just that: you will be starting from scratch and you will have to have the budget to bring everything in, even sometimes down to power, light and heat.

Some of the kinds of suppliers you may need to consider could be:
- an audio visual (AV) company for staging, screen, audio, lighting etc.
- caterers
- bar hire
- activity facilitators
- production (design and print of brochures, lanyards, badges, signage etc.)
- furniture, linen and cutlery hire
- a photographer
- a videographer
- room dressing and prop hire
- transfers from accommodation, stations or airports

You get the suppliers you deserve.
You will have already allocated a budget against these cost centres so you will have an idea of what you have to spend. Treat the project like it’s your own money (it might be!). So, you will want to know; what experience suppliers have, what guarantees they have in place, are they insured and to what level, have they got lots of case studies or images of previous jobs, can you have any client references to contact?

Work out all of the roles that need to be fulfilled, then research options based on your needs. It’s always useful to get three quotes but the usual rules apply – what has the service been like in getting those quotes? If you get a sense that someone will compromise your ability to deliver your objectives, leave them to seek their opportunities elsewhere. Trust your instincts - they are there for a reason! Even if you have experience of a supplier, complacency can set in. It’s a good idea to meet new suppliers in between events, just to keep ideas and attitudes fresh.

Pay attention to detail and provide thorough briefs so that your expectations are understood. Suppliers will quote using different formats so expect to have to put some time in to make sure you are comparing apples with apples. It’s also worth checking whether costs include VAT or not.

Your event may need some sort of printed material such as a brochure, programme, sponsor branding etc and you can never start your design and production too early! Start gathering your content as early as possible, whether it’s sponsor logos and company blurb; speaker profiles, charity project details. It can take a while to collate this information and you also have to manage the designer who will be setting it out. They will have other projects to work on too so don’t assume you can just drop in to their schedule, just when it suits you.

If sustainability is high on your agenda then you could consider replacing your printed brochure with an app or some other form of online document. A Quick Response (QR) code linking to a mobile-friendly website or pdf document can be quite cost effective but expect to pay more for an all-singing event app than you would to produce a printed brochure for say, 200 delegates. That said, there are some quite nifty little apps that are free and can offer quite a bit of flexibility. There are usually limits on the number of downloads that you are allowed though.

Do you want lanyards or badges? What colour and size? Where do you need signage? You will need to put yourself in your attendees’ shoes and plan out your attendee journey; identifying where confusion could occur and clarification is needed. Sometimes it is easier to have a human signpost - an usher in an event branded t-shirt or hoodie, just to help steer people! Some signage isn’t directional; its role is to brand the event. What form will this take? Where should it be placed? Is there a call to action required?

In a similar way that a venue can potentially make or break your event, so can your other suppliers. You are only as good as your suppliers and you get the suppliers you deserve. It’s essential that you have a positive working relationship with your supply team. Don’t fall into the trap of thinking that you are all in a food chain and that there is a natural hierarchy which can dictate how everyone is treated.

If you hit a problem or a wheel begins to fall off (whether it’s of your making or not) your best friend will almost certainly be a supplier, providing your working relationship with them means that they still feel part of the team!
Step 7: Shout from the rooftops!

You don’t need to wait until every last block is in place before you start communicating your event to your audience.

Regardless of whether your attendees are internal staff or external customers, you might want to think about sending a ‘save the date’ email. In order to do this though you will obviously need contact email addresses, which you may not have if you are aiming your event at external contacts.

When communicating your event it’s worth thinking about the following:

**Branding**

Ideally you want to give your event a name, theme or visual identity that can be applied to emails, registration websites and at the event in terms of signage, brochures and the templates for presentation slides or screens. This need not be complicated (you can do it yourself) but the trick is to make it unique, consistent and adaptable so that your audience instantly recognise your event communication. It will tie every piece of communication together and will seamlessly link your entire event.

**Registration Website**

Unless you enjoy the thought of manually handling individual emails and uploading response data into excel spreadsheets, it will be in your interest to set up a registration website where people can provide you with their basic details. There are plenty of free event booking software packages out there if it’s a fairly straightforward capture of information that you require. If you need to gather much larger amounts of information, you may want to talk to an event organiser who can do this for you, especially if yours is a pay-to-attend event. Either way, automate the routine and humanise the unique!

Your bookers will need a confirmation email outlining all of their registration selections (for example, workshops, dietary, access issues etc) and joining instructions (ie explain how to get to the event and any other helpful information such as parking, registrations times etc.)

The link to this site could be communicated via email (if you have the addresses) or via third party routes (see on the following page).
**Email Campaign**

You will be one of the few if your email manages to prompt a huge and immediate response. You need to schedule a campaign of emails, each one selling the benefits of attending or perhaps to chase missing information. These may need to be tailored to different attendee types with different needs or expectations.

Any communication should be personalised as much as possible. We all respond more positively when we receive an email containing our name rather than Dear Friend! You can create this yourself or you can use mass mail facilities such as Mailchimp which are very low cost.

**Third Party Links**

You may be able to link with third parties to help promote your event (unlikely to be required if you are arranging an internal event). But if you are organising a charity event or a trade show, look for media publications or non-competitive organisations and build strategic partnerships. Be prepared to give something up in return.

You might think that the louder your voice (the more places that your message is available and the frequency that you say it), the more likely the uptake. If people aren’t responding though, don’t assume that you just need to shout louder from even more places and more frequently. Think about the relevance of what you are saying and the perceived benefits to the audience. Do they genuinely match up - or do you just want them to?

**Incentives**

You could offer early bird or multi-buy discounts (for pay-to-attend events) or the chance to enter a free draw to win something. The something could be a cost in your budget or it could be something that has already been covered elsewhere or that you have access to, especially if it’s an internal event. For example, we’ve seen internal events incentivise staff to RSVP by offering the chance to win a parking space near the entrance; an extra day of annual leave or perhaps longer lunch breaks for a month!

Extra food and time-off are a great double-act!

**Top Tip!**

When encouraging people to attend your event, don’t get too fixated with the features. It’s easy when you are organising an event to begin to see it through different eyes to those that might attend. Because each component part becomes a building block in the wider event, you might find yourself focusing on these component parts as features of your event. Which of course they are - to you!

However, that’s not what potential attendees will buy into. We use the word ‘buy’ loosely here. Even if it’s a free-to-attend event, it still requires, time, commitment, energy and above all, a desire to want to go. Your potential attendees will want to know what the benefits are to them. That’s all. It’s fine to use features as a means to selling the benefits but don’t just rely on features. Explaining that your conference has ‘Mr Bigshot’ of ‘Ex Why Zed’ speaking may, in your eyes be self explanatory. What you need to be saying is that your conference has Mr Bigshot speaking and their experience means that they will learn ABC.

Starbucks understand their customers - they know that their customers don’t just buy coffee. They buy 22 minutes of personal time on a brown leather sofa...they just happen to be doing it having bought a premium priced warm drink! Understand the benefits your event is really selling and your attendees will be tripping over themselves to get to it.
The event day is really all about delivery, which can be broken down into two components: operational and content.

**Operational**

In your action plan in step 3, you will have worked out who will be helping you deliver the event on the day. In the weeks running up to the event, you should allocate roles to specific people.

You will need to create an event schedule - a chronological plan outlining what is happening at any given point in the whole event set up and delivery process. This is different from your programme or itinerary of event content. This covers the entire set up period through to the last person to leave the venue after the breakdown is complete. Once again a spreadsheet is your friend here.

Start with the very first person or thing that is connected to your project arriving at the venue. List in detail when suppliers will be arriving, where they will be parking, working and when their set up will be complete. Establish who will be managing which suppliers and when. Work out where people need to be at what time and if they need to change location in order to carry out their role.

Build in extra time where possible. Accidents, breakdowns and travel delays happen all too easily. Insist that your suppliers do the same and also build in ‘buffer time’. If you are setting up for a corporate Christmas party and your indoor ice-rink gets stuck in accident traffic on the M6, you don’t want to have to explain to guests that because you didn’t plan ahead, there will be no white Christmas this year!

Arrange a briefing meeting for all relevant support staff as early as possible after you arrive on site at the venue. Establish how you will keep in contact (phone, text, walkie-talkie, regular touch-points) and how you will troubleshoot with the venue… and there will always be some degree of trouble to shoot!

Ensure that the venue is fully aware of any dietary or access requirements. This information (along with general catering requirements) should be confirmed about two weeks prior to the event. Most venues are very good about a few changes very close to the event, as long as they have the big picture around two weeks prior.

Depending on your event type you will need some form of welcome desk, whether to check names off or hand out badges and possibly delegate packs. It’s always best to overstaff this area. Having attendees queuing at the very start of your event sets the wrong tone and it’s difficult to undo that kind of tone!
Free-to-attend events can be difficult to manage from a numbers perspective. You will have some ‘walk-ins’ on the day – those people that haven’t registered but have arrived and want to attend (happy days). You will probably want to allow them to do this so make sure you have a separate welcome desk to handle this, otherwise you will slow up those people who merely want to collect their badges.

Also, be prepared for ‘drop outs’ – those people who have registered but don’t turn up (the scoundrels!) How dare they? Well, get used to it. Drop-out rates can be as high as 50% but usually are around 20-30% for free-to-attend events.

In the interests of your budget (and sustainability!) you should bear this in mind when booking your catering for a free-to-attend event. You don’t want to waste your budget unnecessarily or have generated an embarrassing mountain of food waste. Most venues will comfortably plan to cater for a 10% increase in numbers, so it would be best to under order catering at a free-to-attend event.

After the event, you or one of your support staff should remain on site until the last supplier has left.

**Content Delivery**

This is what the event is all about. As we mentioned before – this is your product! Although speakers, facilitators, entertainment etc will have been decided long before the big day, it’s important that it all works on the day.

Be strict about timings. Some speakers love their own voice and can have little regard for how their over-run impacts the rest of your event. Work out how you are going to keep time and who has the authority to interrupt and keep things on schedule. Be prepared to steal from other parts of your programme to make up for slight over-runs.

Encourage interaction between your speakers and the audience, whether in the form of Q&As or social media sharing. And crucially, very crucially, make sure your speakers know something about your audience and are willing to stay around a while to chat with your audience during refreshment breaks.

Similarly, don’t assume that because your conference is scheduled to break for refreshments at 10:30, that it will. Under-running can be just as much an issue as over-running. If speakers take less time and the audience breaks early, you need to be sure that attendees aren’t waiting around for refreshments to be served. Refreshments need to be brought forward and the only way you will know the status of the timing is to have someone in the room, able to communicate with your other staff, who can liaise with the venue. Always plan for sessions to finish 15 minutes early and check on catering progress.

If your event is more entertainment based such as a gala dinner, timing is still important. You will have planned speeches and entertainment around the catering. It is essential that a slow service doesn’t hold up the schedule. It will be your role as organiser to floor manage the event so don’t expect to get too comfortable at a table!

**Top Tip**

These days, if you don’t know how to get somewhere, almost everyone will use a sat-nav. Here’s a top tip for you…check that the postcode given to you by the venue actually directs you to the venue!

We were using a brand new venue, recently built in a semi-rural location and took the postcode from their website for use on the joining instructions we emailed to attendees. A large number of delegates arrived 45 minutes late because the postcode directed them to the venue’s head office in a business park several miles away.

The actual venue was so new and almost isolated, that it didn’t have a postcode at the time the owners created their website and marketing materials. In lieu of an accurate postcode, they decided to use their off-site office postcode and forgot to change it once the actual postcode had been created.

So there’s another lesson: double-check all information provided by a 3rd party (particularly postcodes and measurements) no matter how unlikely it is that you would think they could get their own address wrong!
There is inevitably a sense of relief once the event is over. Everything seems to have gone well and you can get back to the day job!

Whoa! Let’s just press PAUSE a second!

Let’s go back to the original question in step one… how do you know the event went well and did it achieve its objectives? Now is the time to evaluate!

The nature of your event and its audience will determine what kind of evaluations you can carry out but there are a few routes that can help create a rounded picture of the event’s success and again it’s worth bearing in mind you should look at your project operationally and from a content point of view.

**Anecdotal Feedback**

One of the best times to start gathering information is during the event itself. Informally talk to people and make notes of what they say (but only after you have spoken to them otherwise it can look VERY formal!). Encourage people to share their experiences. If one person expresses a particular opinion, ask others if they feel the same way. Look for trends. Catching people at this stage also gives you a chance to address any complaints or service issues that have arisen without your knowledge.

**Monitor Social Media**

You can do this during and after the event. Set up a # for your event and encourage attendees to share views and reactions. You could even set up a best photo competition on social media and see what aspects of your event your guests focus on. This sort of feedback is instant, honest and free. Users of social media expect and appreciate instant gratification so monitoring will enable you to respond to, or resolve any issues arising.

**Post Event Evaluation**

You can set up an online evaluation post event using free survey tools such as SurveyMonkey. The nature of your event will determine how extensive or complicated your evaluation should be. You will know your audience – some won’t be prepared to answer more than a handful of questions, others will want the opportunity to rate many aspects of the event. Be warned that if the evaluation is quite lengthy then there will be a nominal monthly charge to use a tool such as SurveyMonkey.

Also, if you have different attendee types, you may require different evaluation forms, for example, attendees, exhibitors and sponsors. Establish a ‘close-by’ date and even incentivise a response if possible. This needn’t be a financial incentive. For example, perhaps it could be access to photos from the event online or a Continued Professional Development (CPD) certificate.
TEAM DE-BRIEF
The day after the event, gather your team together and have a full debrief. Collate all anecdotal evidence and share your learnings, both operationally and from a content point of view.

Some speakers will have been better received than others; some sessions will have been proved more relevant than others and maybe, unbelievably, not everyone liked your choice of band (even though your cousin did it for you on the cheap!).

There are always learnings: the good, the bad and the ugly. Contact your suppliers too and find out their take on how the event processes went. They can often provide insight from a completely different perspective. For example, were they all tripping over themselves during set-up and were they given the access that had been promised?

THE FINAL REVIEW
Some weeks after the event, you should be in a position to have reviewed and analysed the feedback from all quarters. What went well? What would you do differently? What was the outcome?

You can then close the circle; revert back to step one and establish if your objectives have been hit. Sometimes this may not be possible until much later on, but the chances are you will be able to assess whether the direction of travel is positive.

TOP TIP!
When trying to find out how people are enjoying the event, don’t ask “is everything OK?”

If you ran a restaurant, asked a customer how their meal was and they replied “it was OK”, it would imply completely the opposite! Ask how they are enjoying the event; explore their answer; find out what it is that they particularly liked or disliked. Try and keep your questions open-ended.

If your event is likely to re-occur, these conversations will help turn these people into mini-champions who will encourage others to attend next time.

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Even if your event is a regular feature in your corporate or personal calendar, how it performs is not only dictated by following (or not) the steps featured in this guide. It will be a different event each time it unfolds.

There are socio-economic backdrops to consider, the composition of the attendees, even (and especially) the location and the weather can impact on the success of an event.

As we said at the beginning, we can’t cover the specifics of every event type in this guide but broadly speaking, the principles we have covered apply to most types of event.

We will leave you with three final thoughts, which we believe are crucial to take on board, regardless of the kind of event that you want to create:

**Pay attention to detail**
Seek clarity at all stages. If you have no written record of an agreement or arrangement, but have assumed that everyone knows about it, or everyone takes it for granted that everyone else knows about it, then it will be safe to assume it WON’T happen.

**Ask yourself “Why?”**
Constantly challenge your decisions. Why this over that? Why that venue over the others? Only if the answer brings you back to your objectives, is it the correct decision. Don’t allow personal choice to be the default solution.

**What is the weakest link?**
Every event has a weak link, somewhere. Look for yours. Go through the details and list the things that could go wrong. Then do everything you possibly can to minimise the chances of them going wrong. They may be issues with timing, suppliers, audience reactions...brainstorm all that you can.

We hope you have found this guide useful and are looking forward to diving into the eventasphere and getting stuck in to your own project.

We think you’ll be fine but if you begin to feel more stuck than stuck in, drop us a note. We’ll help unstick you.

If you are still wondering if you will actually be able to deliver the event that you need, as parting inspiration we’ll leave you with wisdom of someone, who, in our opinion, is one of one of the greatest thinkers of our time...the incomparable Dr Seuss.

Wherever it is that you want to get to - enjoy your event journey.

“**Think left and think right and think low and think high. Oh, the thinks you can think up if only you try!”**

Dr Seuss