

## WA7: Business Travel, Diary Systems, Meeting organization and event management

### 5.1. Design, plan, organise meetings and other events

LO145: Demonstrate ability to develop and agree the concept for an event based on sound market research and good understanding of the needs and interests of likely participants, taking account of previous or competing events as well as introducing elements of innovation and creativity.

LO146: Demonstrate ability to research and agree the objectives for the event, evaluate the feasibility of these objectives in operational and financial terms; negotiate and agree a final brief before further planning takes place.

LO147: Demonstrate ability to develop and agree a Business Plan for an event and negotiate internal finance and external sponsorship.

LO148: Demonstrate ability to identify, negotiate and secure a venue for an event, which meets relevant operational and budgetary requirements based on the Business Plan for the event and that forms the basis for a contract with the venue manager.



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# Module Details



<b>Work Area Code:</b>	7
<b>Work area title:</b>	Business Travel, Diary Systems, Meeting organization and event management
<b>Unit Code:</b>	5.1
<b>Unit Title:</b>	Design, plan, organise meetings and other events
<b>Learning Outcomes Ids:</b>	LO145, LO146, LO147, LO148
<b>Learning Outcomes titles:</b>	<ul style="list-style-type: none"><li>- Demonstrate ability to develop and agree the concept for an event based on sound market research and good understanding of the needs and interests of likely participants, taking account of previous or competing events as well as introducing elements of innovation and creativity. (LO145)</li><li>- Demonstrate ability to research and agree the objectives for the event, evaluate the feasibility of these objectives in operational and financial terms; negotiate and agree a final brief before further planning takes place. (LO146)</li><li>- Demonstrate ability to develop and agree a Business Plan for an event and negotiate internal finance and external sponsorship. (LO147)</li><li>- Demonstrate ability to identify, negotiate and secure a venue for an event, which meets relevant operational and budgetary requirements based on the Business Plan for the event and that forms the basis for a contract with the venue manager. (LO148)</li></ul>
<b>Recommended Duration:</b>	5 hours
<b>Trainer:</b>	



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## In this unit, you will learn about:

1. Event concept design
2. Setting event objectives
3. Developing Event business plan
4. Negotiating internal financing and external sponsorship
5. Selecting and securing the venue for the event
6. Event evaluation and monitoring



The **right concept** for a specific event is crucial in making a favorable **impression** on all stakeholders. Choosing the ideal concept can provide **effective brand positioning** for the company, as well as generate **positive awareness**.





# Events Concept Design



**Theme of the event** should be linked to the purpose, it should be compatible with guest/audience needs and consistent in all respects.

Most events adopt a **colour scheme** that is repeated on all items produced for the event such as ticket, programs, uniforms, decor, poster and merchandise. It also helps attendees to identify with the theme

Potential themes are endless, limited only by your imagination and customer's pocket. Some examples: historical, artistic, musical



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## 5 Questions to Ask When Creating an Event Concept

- 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 and other relevant stakeholders.
- In conceptualizing an event you need to brainstorm to **determine** the experience, **develop** the concept then **design** the experience.



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## **1. Why** is the event being held? (what is the event supposed to achieve?)

- Identify the importance and viability of holding the event.
- In considering the scope of the event and the features within it, there must be continual reference back to the aims and objectives of the event.
- With limited resources come difficult decisions, so it is always a case of balancing aims and objectives, against different elements of the event to achieve the best outcome.



## 2. Who are the event's stakeholders?

- Understanding the event environment is fundamental to creating a spectacular affair.
- In order to understand this environment, the event's stakeholders (major players) must be identified.
- The event manager must examine the objectives of these major players and understand what each of them expect.
- Once this is understood, you will have the necessary information to bring together the creative elements of the event.





## 2. Who are the event's stakeholders?

- It requires a detailed consideration of the event target market : Who are they? Where do they live? How will they travel to your event? What types of events do these people go to? What will they expect at your event in terms of entertainment, standard of facilities and amenities? What proportion of new customers and repeat visitors are there? When and how do they buy tickets? How often do they go to events? How big is this market? How big should this event be? What type of capacity will you be catering for? ...



## 3. When is the event taking place?

- Target audience, event activities, venue availability, market characteristics and event organisers' preferences help define suitable dates, e.g. if the market segment targeted is families with young children, then school time must be avoided.
- Consider the needs of the audience, and be informed of any climactic conditions if the event is to be held outdoors.



# 5 Questions to Ask

## 3. When is the event taking place?

- If there is flexibility in the staging of the event, then dates must also be selected with due consideration for competition for audiences and resources to stage the event.
- It is essential to have a clear picture of other events in the area/market and understand how they will impact on visitor numbers and behaviour in the area and availability of resources such as venues, staff, equipment and even parking spaces.



# 5 Questions to Ask

## 3. When is the event taking place?

- The duration and range of activities are closely related, as the longer the duration the more programming is required.
- When deciding on event duration, one must look to the stakeholders involved in the event and their individual needs and expectations. Also through identifying which elements of the programme can run in parallel and which must be sequential then the desired event duration can be ascertained.



## 4. Where will the event be staged?

- The venue choice must represent the best compromise between the organizational needs of the event, audience comfort, accessibility and cost.
- The **location** relates to where the event takes place for example a specific town, village or geographical area.
- The **venue** is the actual site of the event, which could be an existing event venue or a greenfield site.





## 4. Where will the event be staged?

- Decisions over where an event should it be held may be relatively simple or very complex depending on the requirements of the event itself. However, regardless of size, decisions of venue and location must relate back to the events purpose and aims, whilst also conforming to the various selection criteria, that will be mentioned later on.



## 5. What is the event content or product?

- This must match the needs, wants, desires and expectations of the audience, and must synergize with the why, who, when and where of the event.
- This requires a detailed consideration of the core or primary activities and attractions of the event, which will be determined by the event nature e.g. music, sports, arts or culture. In addition to the main features and attractions, it is also common to have a range of secondary activities, which will increase the scope and attractiveness of the event to different stakeholders.



# 5 Questions to Ask

## 5. What is the event content or product?

Below are some examples of primary and secondary attractions:

- Opening ceremony.
- Music (live / DJ/ background).
- Food and drink (central or peripheral).
- Socialising / networking.
- Speakers / presentations.
- Entertainers / performers / celebrities.
- Fireworks.
- Race / match / games / competitions.
- Exhibitor / product displays.
- Play / performance.
- Dancing / dancers.
- Retailers and stalls.



## 5. What is the event content or product?

- In determining the mix of features and programming of event elements, it is also important to **consider the unique attributes, history and heritage of the event location and venue** and how these can be incorporated into the event to complement its outcomes.
- Aspects such as programming need careful consideration to achieve the **correct balance of activities** to meet the needs of all the different stakeholders in the event.
- In the context of repeat events, **you should always seek to introduce new elements** to the event to keep it fresh and enticing, whilst also retaining elements which are core to the overall experience.



- **Stakeholders** are those people and groups with a stake in the event and its outcomes, including all groups participating in the event production, sponsors and grant-givers, community representatives and anyone impacted by the event







- **Events rely on a range of partners or stakeholders for design and delivery, so it is important to identify who the key stakeholders are for your event project**
- **for example:** Event principal (key person in host organisation or client), Organising committee, Sponsors, donors, Local community, Local authorities (e.g. Council, emergency services, environmental authority), Service contractors ( e.g. Staging, cleaning, catering, security), Suppliers, Performers, entertainers, **participants**, spectators, audience, media



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# Assessment of stakeholder needs and interests



- Once all of the stakeholders for your event have been identified you can then begin to assess their interest and involvement in your event, their specific needs and how their needs can be met.
- For example:
  - Local businesses will need to be assured that their trade will not be adversely affected by your event, so it is important that, where possible, the customers and activity related to your event do not prevent others from using local amenities.
  - Sponsors, will be seeking positive media coverage and enhanced community image, so the event must have news worthy aspects which also take into account the local community's needs.



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- Having identified the range of stakeholders it may not be obvious what their needs and interests are, therefore it is valuable to **research each stakeholder group** and, if appropriate, **identify and open communication channels** with the different groups to understand their needs.
- This may take the form of **meetings, questionnaires, focus groups, community consultations**, depending on the scope of consultation required to gain their input and understand their needs.



# Designing a survey for likely participants



When collecting information, following methods can be used:

- Questionnaires (online, paper)
- Interviews (open, structured)
- Meetings



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# Designing a survey for likely participants

## Questionnaires



- Used to collect standardised data from large numbers of people so that the same information is collected in the same way. They are used to collect data in a statistical form.
- They are generally used to make generalisations, therefore, the surveys are usually based on carefully selected samples.
- Questionnaires consist of the same set of questions that are asked in the same order and in the same way in order that the same information can be gathered.



# Designing a survey for likely participants

## Questionnaires

- Questions can be:
- Open ended (more difficult to extract quantifiable data)
- Closed
- Fixed-choice
- Likert scale - where participants are given a range of options (agree, strongly agree, disagree...



# Designing a survey for likely participants

## Questionnaires Advantages



- Practical
- Large amounts of information can be collected from a large number of people in a short period of time and in a relatively cost effective way
- Can be carried out by the researcher or by any number of people with limited affect to its validity and reliability
- The results of the questionnaires can usually be quickly and easily quantified
- Can be analysed 'scientifically' and objectively
- When data has been quantified, it can be used to compare and contrast other research and may be used to measure change

# Designing a survey for likely participants

## Questionnaires Disadvantages

- Cannot capture subtle information like changes of emotions, behaviour, feelings etc.
- It is asking only a limited amount of information without explanation
- There is no way to tell how truthful a respondent is being
- People may read differently into each question and therefore reply based on their own interpretation of the question
- There is a level of researcher imposition, meaning that when developing the questionnaire, the researcher is making their own decisions and assumptions as to what is and is not important...therefore they may be missing something that is of importance





Surveys answer basic questions that help businesses provide a better product or service for their customers.

## Survey types:

- Market description: Who is your typical customer?
- Customer attitudes: How does the customer feel about the product or the business?
- New product concept: Is there interest in a new product?
- Habits and uses: How is your product being used by the consumer?
- Advertising value: How did customers learn about your product?



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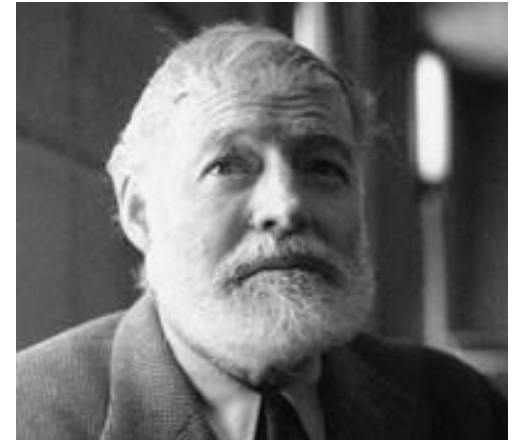
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# Understanding others' needs



“When people talk, listen completely.  
Most people never listen.”

— Ernest Hemingway



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## 1. Ask insightful questions

- Think of what it is that you want to understand and try to ask the right question
- Do not provide answers, just ask!
- Don't ask questions that can be answered with a no or a yes
- Dig deeper
- Use the power of silence!



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## 2. Listen carefully

- listen without looking for clues to turn around the conversation
- When you listen carefully, don't interrupt and simply absorb what you're hearing, you're sending a subtle message: I care about you, and I care about your views.



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## 3. Play back & paraphrase

- two important ways of confirming whether you've understood what the other person was trying to say.
- you confirm to the other person that you you're not only listening, but also understood what they were trying to say.



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## 4. Listen for more

- when you play back and paraphrase, two things will start to happen.
- First, the person will correct your views in some way, and attempt to explain what they were trying to say in the first place.
- Second, they will often offer up additional information that builds on what they initially said.



## 5. Confirm your understanding

- By doing this you reassure them that you have a full understanding of their needs, and show them the respect and attention they deserve.







**Market research** is generally divided into three types: exploratory, descriptive, and causal.

Many companies hire a market research firm to conduct their research, as they can recruit the participants and provide a research site. Depending on the type of research, participants may even be compensated for their time, so this needs to be considered as an extra expense when planning research.



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- **Exploratory research** is also known as **qualitative** market research. The goal is to better understand the situation or behavior you are trying to change and set the scope of your research.
- This step could start with a literature search to gather more information, then lead into individual interviews with potential customers. Sometimes the research is conducted using a focus group so ideas can be discussed with several individuals at one time.



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- **Descriptive research** is also called **quantitative** research. This step helps to quantify results with specific measures.
- For instance, your audience (potential customers) in descriptive research might be asked to rate potential themes for the event based on their preference or sort the needs based on their importance.
- Responses are structured so they can be measured and so you only ask one question at a time.





- The goal in **causal research** is to understand the cause and effect relationship between variables. What reaction does a variable cause? This can be a little more difficult to determine. For example, the marketing team is trying to decide which supporting activities might create more ticket sales.





- **Market research** is a strong tool in determining marketing messages, design aspects for products, and even which venues can be most successful in selling a product. For all types of research, whether you decide on exploratory, descriptive, or causal, it is important to:

1. Identify the audience for your research
2. Determine what information you are seeking
3. Ask the right questions
4. Summarize the results to make decisions





# Share your experience



**How would you research and identify previous and competing events?**

**What methods other than those mentioned earlier would you use?**



## Group discussion



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## • Documents Research

- Reference material
- Magazines
- Newspapers

## Internet Research

- use of Web search engines, meta search engines, Web directories,
- specialty search tools enable users to find information that conventional search engines and meta search engines cannot access because the content is stored in databases



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Inspiration can be dangerous.

Be smart and recognize the temptation to imitate.

Event concepts spread like viruses (hence popular themes or trends), to imitate is a completely different story...



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# Share your experience



**Have you encountered any problems or challenges during event planning in the past?**

**How did you solve them?**



## Group discussion



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# Possible problems during Event Planning



## UNCLEAR BUDGET

- Always be sure to set a threshold for your event so that you don't end up paying for your mistakes after (literally).
- Set a clear budget limit for your event
- Track your expenses as you go
- Get creative and come up with unique ideas (e.g. decor, etc) that are also budget-friendly.



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# Possible problems during Event Planning



## POOR TIME MANAGEMENT

- Set short and long-term targets to make sure things are done when they need to be
- Start off with the info essentials: event venue, event size and which are events going on at the same time



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# Possible problems during Event Planning



**MURPHY'S LAW** – Anything that can go wrong, will go wrong

- Complete a risk assessment of your event and identify where changes are most likely to occur or areas where event success could be jeopardised
- Based on your risk assessment be sure to have a back up plan and cover all your bases
- Take a breath. We cannot predict the future – but plan for the worst and hope for the best!



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# Possible problems during Event Planning



## TOO FEW TEAM MEMBERS

- Not all organisations have an event team dedicated to planning their events. Sometimes it's a one-person army tackling the annual conference and other times it's a team of ten devoted souls working towards an exhibition
- Ask for help when you need it
- Be a team player
- Buy coffee and muffins to say thanks!



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# Possible problems during Event Planning



## PURPOSELESS EVENT

- Let's be honest.. An event without a 'real' purpose is just a party. Also, it is quite a waste of effort and time. Ask those questions:



- Why are those particular guests being invited to your event?
- What should your event mean to them? What will it bring them?
- Don't over complicate things. Just make sure your guests know why they are attending your event and that their attendance is valued and appreciated.



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# Possible problems during Event Planning



## CARELESS MISTAKES

- Create an in-depth event plan that describes what needs to be done, when and by whom (in detail)
- Make sure you and your team all understand the plan and are ready to commit to it
- Simple mistakes can happen, we're only human – so dust yourself off and keep going!



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# Possible problems during Event Planning



## INSUFFICIENT EXPERIENCE

### **As a team manager:**

- 1- LEAD your team – (almost) anyone can manage
- 2- Positive reinforcement goes a long way

### **As a team member:**

- 1- There is no 'I' in team
- 2- Work to your strengths – this is the best approach when there's not enough time and much to do.



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# Possible problems during Event Planning



## TOO MANY TOOLS

- **How does one then sift out the useful from the useless tools?**
- If you still have to 'figure out' a tool but you're "sure it will help" – don't bother wasting your time picking and testing tools when you don't have the time
- Less is more. One or two integrated tools can go a long way – if you often find yourself planning events, look into online software that can be customised to meet your needs.



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# Possible problems during Event Planning



## CHANGE MANAGEMENT

It is unlikely that your event plans will remain constant – change is inevitable. A lot of the times though failing to keep track of event changes are as a result of a budget or task management issue.

- Make sure your budget is airtight and thoroughly thought-out
- Set a realistic and detailed event timeline and pre-plan as much as possible
- Gather details on any changes, e.g: the reasons for the change, who is responsible, etc – this way you can consider these insights for your next event



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# Methodological tool

- Event concept
- EUPA\_LO\_145\_M\_001



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# Event goals and objectives



**Prior to planning it's important to think about what your event goals and objectives will be.**

Many planners dive right into planning without even considering this very important matter. Don't make this mistake!



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# Event goals and objectives



- Think of your goals as your event's **purpose**. Your purpose is the big picture reason your event exists – where you want to be vs where you are now.
- Event goals are the reason your event exists – to inform, to include, to celebrate, to persuade, etc...
- example> If your company is a university with the goal of new freshman to apply, your event purpose might be to educate potential applicants about your program offerings and campus vibe.



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# Answer those questions



- What is the primary purpose of the event?
- What kind of experience do you want your guests to have?
- What environment/ambience are you going for?
- What are the event goals?
  - Is it a fundraising event?
  - Is it a prospecting event?
  - Is it a campaign kickoff?
  - Is it a training event?
  - Is it educational? Is it important for it to be interactive?
  - Is it a celebration?



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Good targets are ones that meet the SMART test. They are:

- **S**pecific – they say exactly what you intend to do
- **M**easurable – you can prove you've reached them
- **A**chievable – they are not beyond your reach
- **R**ealistic – you haven't been over optimistic
- **T**ime-related – you have a deadline for completion.

*Ideally too they should be:*

- **easily understood** – so that not only you but everybody else understands them
- **have the support** of your line manager and colleagues.



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# Objectives example



- Number of participants
- Value of grants and donations
- Break-even or amount of profits
- Level of media exposure
- Number of repeat visitors
- Value of merchandise sold
- Value of food and beverage sold
- Number of exhibitors, stall holders



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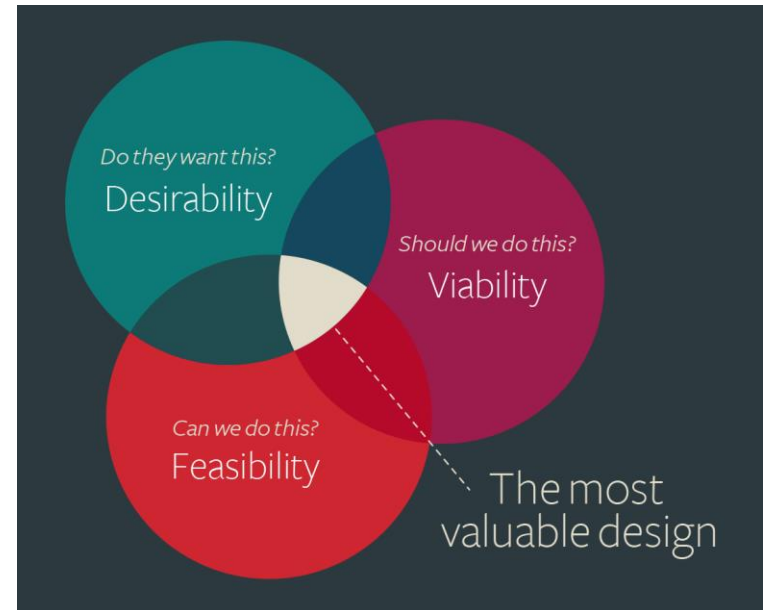
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## Event Feasibility Study

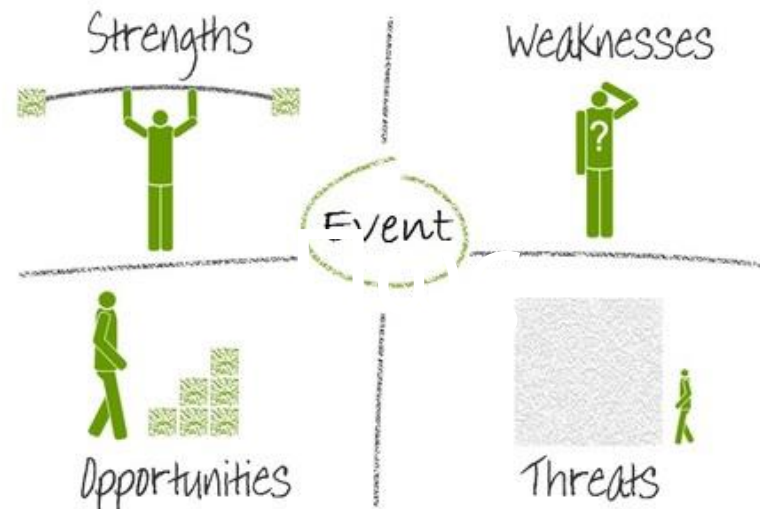
- Having identified and defined all the elements of the event, it is necessary to consider the feasibility of the proposed event. The factors would be considered at the same time as the event is being designed.



- **Market factors:** Target market, demand, supply, competition, etc.
- **Operational factors :** Venue availability, skills required, resources, licenses and permits, etc.
- **Financial factors :** Costs and predicted revenues, funding sources, etc.



- After considering the above areas it is common practice to undertake a **SWOT analysis** which identifies Strengths, Weaknesses, Opportunities and Threats.
- Strengths and weaknesses are issues which relate to the event concept and the organisation delivering it. Opportunities and threats are issues relating to the external environment which you are operating within.





- Following on from your SWOT analysis, the outcomes would be to proceed with the concept as defined, defer the staging of the event to a later date when it is feasible, cease event planning or amend the event on market, operational or financial grounds.





Commercial negotiation consists of three fundamental elements:

- the actors, eg.: the seller and the buyer;
- the differences: of objective, information, statute, values;
- the desire of making an agreement;



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- The AIDA method proposes the seller a four step process:
  - ATTENTION - The seller must attract the clients' attention by addressing questions or by using a positive and different presentation or by presence and looks
  - INTEREST - The seller must provoke by making a demonstration based upon evidence, tangible facts and by the ingenious maneuver of the merchandise
  - DESIRE - The seller awakens the client's desire to buy with the use of argumentation techniques
  - ACTION - The seller must reach an agreement which means to provoke the client to decide by trying to modify the client's attitude and by taking advantage of the opportunities



## 1. Listen and understand the other party's issues and point of view.

- The best negotiators tend to be the ones who truly listen to the other side, understand their key issues and hot buttons, and then formulate an appropriate response.
- Try to gain an understanding about what is important to the other side, what limitations they may have, and where they may have flexibility.
- Refrain from talking too much.





## 2. Be prepared. Being prepared entails a whole host of things you may need to do, such as:

- Review the background of the person you are negotiating with
- Review what similar deals have been completed by the other side
- Understand the offerings and pricing from competitors of the party you are negotiating with.



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## 3. Keep the negotiations professional and courteous.

- Nobody wants to do business with a difficult or abusive personality.
- Establishing a good long-term relationship should be one of the goals in the negotiation.
- A collaborative, positive tone in negotiations is more likely to result in progress to a closing.



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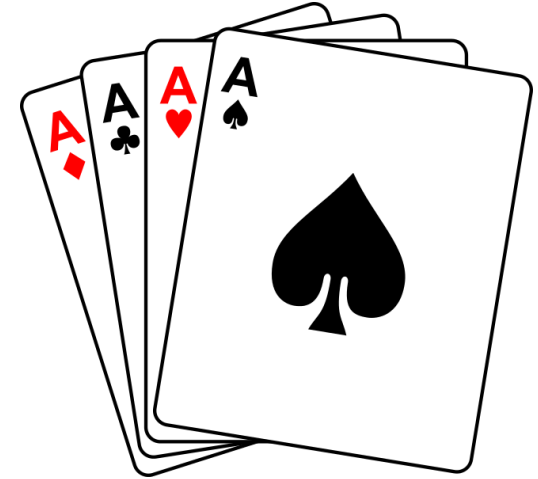
## 4. Understand the deal dynamics.

- Who has the leverage in the negotiation?
- Who wants the deal more?
- What timing constraints is the other side under?
- What alternatives does the other side have?



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## 5. Be prepared to “play poker” and be ready to walk away.

- Know before you start what your target price or walkaway price is.
- Be prepared with market data to back up why your price is reasonable, and if you are confronted with an ultimatum that you absolutely can't live with, be prepared to walk away.

## 6. Avoid continually compromising

- If you are giving way a point, make sure you get something in return





## 7. Keep in mind that time is important.

- When a deal takes long to complete, something might go wrong
- Be prompt at responding
- However, don't rush and make concessions when there's no need.

## 8. Don't ignore alternatives

- Having alternatives can strengthen your position
- By negotiating with two or more parties at the same time, you can often obtain better pricing or better contractual terms.



## 9. Don't get stuck in one issue.

- Sometimes it's best to set an issue aside for the a while
- A creative solution may come to you later outside the heat of the negotiation.

## 10. Don't accept the first offer.

- It's often a mistake to accept the first offer from the other side.
- Counter-offers and some back-and-forth negotiation can work in most cases



# Methodological tool

- Event objectives
- EUPA\_LO\_146\_M\_001

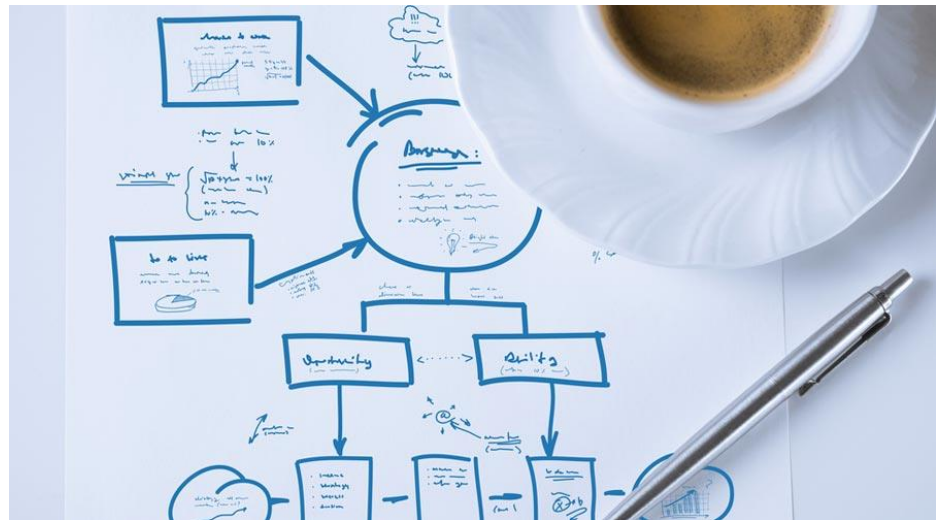


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# Developing a brief

Comprehensive, detailed brief becomes the guiding document for the entire planning process, and defines exactly what you, as the event manager, need to do, and the constraints within which you need to do it.







## Brief contents:

- Objectives and goals
- Budget and schedule
- Target audience and stakeholders
- Scope of the event
- Eventdesign with all details known at the moment
- Available/required resources
- Any definite "Do nots"



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# Business Plan for the Event



Regardless of the scale, age or history of your event, the Business Plan is an essential tool that will:

- Communicate the vision, purpose and benefits of the event to others
- Enable you to focus on the event's potential to develop and grow
- Illustrate and help secure the event's viability and sustainability in the longer term
- Show how much money is needed and what it is needed for
- Help you plan the resources, delivery and operating structure
- Help you raise funding
- Help you measure success



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1. Cover page
2. Contents
3. Executive summary (minimum of one-page, but no more than 10% of the total length of the plan)
4. Background and History
  - Who we are
  - Event History



## 5. Event Overview

- Mission
- Key Objectives and Deliverables
- The event
- Target market
- Stakeholder involvement and benefits



## 6. Development plan

- Vision
- Strategic Development
- SWOT Analysis



## 7. Event Requirements

- Facilities
- Services
- Production
- Legal and insurance



## 8. Marketing & Communications Plan

- Positioning
- Product
- Price
- Promotion
- Budget plan





# Event Business Plan Contents



## 9. Financial Plan & Considerations

- Income and Expenditure Projections
- Economic Impact Estimation

## 10. Management and Business Controls

- Event Action Plan
- The business
- Evaluation of outcomes
- Risk factors

## 11. Conclusion

## 12. Appendices



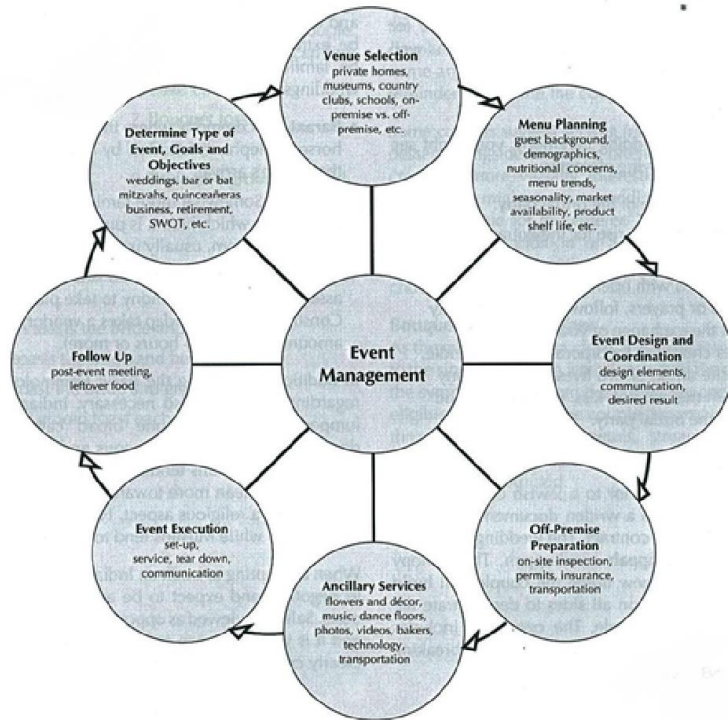
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# Event planning cycle

## CLASSICAL APPROACH



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# Event planning cycle

## MODERN APPROACH

### The Event Planning Cycle

#### Planning

- Market research
- Written plan
- Finalise budget
- Venue selection
- Vendor selection
- Secure sponsorship

#### Post-Event

- Event breakdown
- Reconcile budgets
- Thank you to everyone involved
- Share highlights & media
- Survey
- Analytics
- Wash-up meeting

#### Eventbrite

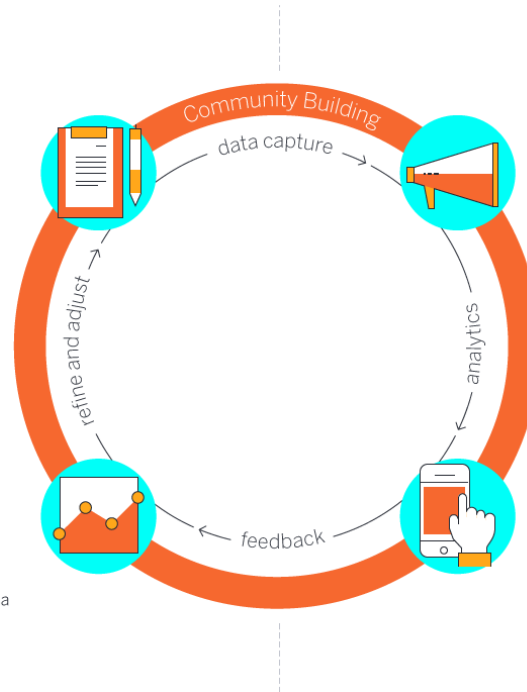
#### Promotion

- |               |             |
|---------------|-------------|
| Email         | PR          |
| Social media  | Discounts   |
| Partnerships  | Blog        |
| Word of Mouth | Direct mail |
| Advertising   | Eventbrite  |
| SEO           |             |

#### At-Event

- Smooth entry management
- Deliver the planned experience
- Capture and share highlights
- Experience your own event
- Note what works and what doesn't

[www.eventbrite.co.uk](http://www.eventbrite.co.uk)



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## POSSIBLE SOURCES:

- Reserves from previous events
- Tickets/entry fees / registration fees
- Grants and subsidies
- Loans
- Donations
- Sale of Advertising sites (e.g. venue, programme, menu, etc)
- Merchandising sales
- Sponsorship



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## POSSIBLE SOURCES:

- Raffles, auctions and other event fundraising
- Pre event fundraising activities
- Commercial rights (e.g. pouring rights)
- Commissions (e.g. merchandise, venue bar, retailers)
- Television fees
- Benefits in kind (e.g. donated product, prizes, free advertising, etc)





= **business relationship** between the event organiser and the sponsors. It is a **two way** process whereby the sponsor is gaining rights and **benefits in return** for investment in the event.



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## Motivations for sponsoring events include:

- Gaining access to your events target market.
- Generating goodwill towards the sponsor.
- Generating brand awareness and acceptance
- Positioning or repositioning an existing product or service.
- Client and employee entertainment/hospitality.
- Merchandising opportunities and the ability to demonstrate products.
- To create awareness of an issue (e.g. road safety).
- To gain access to the event e.g. tickets and corporate hospitality.







## A formal sponsorship proposal should answer a series of questions:

- **What and where is the event?** Provide an overview of the event (mission/goals, aims & objectives, history, board members, etc.) Details of current and past sponsors, programme, media coverage, attendance levels and profile, location, etc.
- **Why should they sponsor it?** Provide details of sponsorship package/s offered e.g. marketing and promotion and onsite activities and costs. Proposed conditions of the potential sponsorship agreement clearly identifying sponsor benefits and rights. Highlight the strategic fit between event and sponsor.
- **When?** What is the duration of proposed agreement?
- **Who** should they contact?

**Some organisations have set requirements for proposals, so you should always clarify these before approaching them with a proposal.**



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# Methodological tool

- Event Financing
- EUPA\_LO\_147\_M\_001



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# Event venue characteristics



- **Marketing** - match needs of target audience.
- **Functional** - Size and capacity, layout and design.
- **Operational** - Access, stage size, power, water, facilities, parking, ticketing.
- **Risk management** - safety and control, emergency provisions, infrastructure.
- **Financial** - affordable within budget.
- **Aesthetic** - attractive and complementary of event.



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# Event venue characteristics



In addition to the venue itself, it is also important to consider external factors when selecting your venue:

- Hotels and accommodation supply in the surrounding area for participants / visitors.
- Access routes to the location and venue.
- Drop off and car parking facilities.
- Distance from stations / terminals / airports.
- Exhibition access / loading areas.
- Building development and planned road works.
- Other events competing for venues, resources and customers.
- Other events likely to create issues for suppliers or visitor access.



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# Meeting /Event venue selection criteria



## **Suitability:**

Check to see if the venue is big enough to accommodate all the attendees of the meeting.

**Location:** Make sure that the venue is in a location accessible to all the attendees

**Availability:** Check to see if the venue is free on the date requested to avoid disappointment at the last minute. It can create further problems not knowing the venue is not available after all arrangements have been made and all attendees have arrived.



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# Meeting /Event venue selection criteria



## Size:

Check to see if the venue can accommodate all the attendees and the resources that they will need, and if help is available to use resources needed.

## Facilities:

Check the venue to see if you can hold the event there without any trouble in using the resources.

## Cost:

Also check to see if the venue fits into the budget and if it is cost-effective.



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# Venue resources and equipment



- ✓ *Writing material*
- ✓ *Hotel rooms and meeting and conference rooms*
- ✓ *Conferencing equipment – audio and visual*
- ✓ *White Board, Flipcharts*
- ✓ *Microphones*
- ✓ *Translating equipment*
- ✓ *Hi-speed internet connection*
- ✓ *Speakers desk*



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# Venue resources and equipment



- ✓ *Catering services*
- ✓ *Parking places*
- ✓ *Leisure services (swimming pool, golf-course, ball-room, wellness,...)*



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- **Indoor venue options** include:  
Museums, schools, colleges, universities, galleries, convention centres, nightclubs, restaurants, leisure centres, hotels, tourist attractions and historic buildings.
- **Outdoor venue options** include:  
Parks, streets, theme parks & zoos, markets, sports grounds, national parks, squares, vineyards and open farm land.





The event manager needs to carefully consider the planning implications of choosing an unusual venue in preference to a standard venue requiring decoration only to match the theme.



Lighting, sound and catering also provide challenges in unusual settings



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# Detailed Venue Planning



- 1. Having a **scale map** of the venue and surrounding area will assist in the early stages of planning. This will help with venue **layout design** and also identifying what is in the area surrounding your event e.g. entrances, exits, offices, storage areas, loading bays, car parks, access routes, etc.
- 2. Develop an **inventory of all the facilities** that the venue has available for you to use e.g. reception areas, kitchens, bars, storage areas, offices, parking areas and loading bays. Where the venue does provide elements such as bars and catering, the terms and conditions around these areas should also be negotiated prior to signing contracts.
- 3. You should identify what the venue has in terms of furniture, fixtures, staging and **technical equipment** required to run your event and what you are entitled to use.

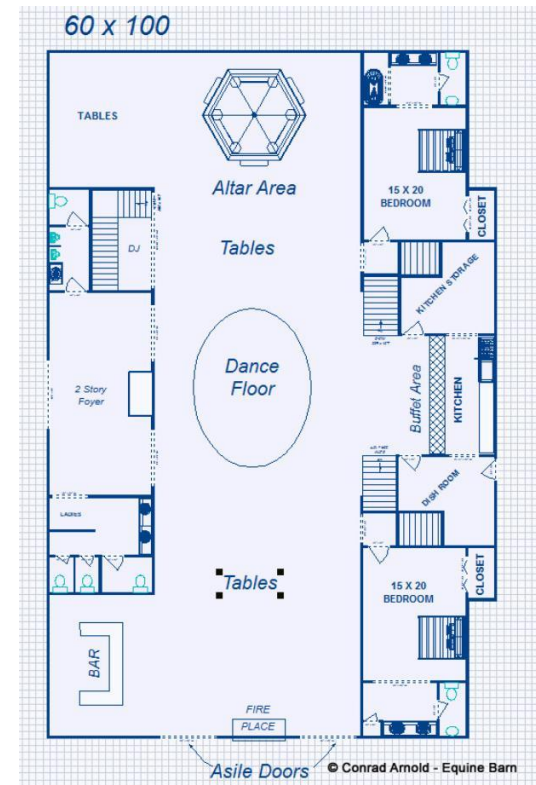


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# Detailed Venue Planning

- 4. In addition to producing venue plans, actually **visiting the venue** and visualising how each area will be constructed is a useful exercise and can help identify potential problems in your ideas and plans.
- 5. You should produce **clear scale drawings** of the venue noting aspects such as performance areas, staff and guest areas. This will then tie into aspects such as security, personnel deployment and passes for controlling access around your venue.





**What should the venue booking contract contain?**

**Do you have any Best Practice recommendations for your fellow learners?**



## Group discussion



# Methodological tool

- Event Venue
- EUPA\_LO\_148\_M\_001



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# Event evaluation and monitoring



- The final stage of events management is the evaluation of the events outcomes and the processes employed to achieve set outcomes. The fundamental purpose of event evaluation is to identify positive and negative practices with a view to improving future performance.



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# Event evaluation and monitoring



- Evaluation is not something which happens at the end of the event, it must be incorporated into the planning of the event, so resources are allocated, the correct questions are asked and data collected.



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# Event evaluation and monitoring



- If **specific aims and objectives** were set at the beginning of the planning process, then evaluation will also seek to establish whether **those targets have been met and if not then why?**
- The other purpose of evaluation is a **reporting mechanism**, to gather data to allow feedback to **different stakeholders involved** in the event relative to their interests.



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# Event evaluation and monitoring



- **Key questions you should ask include:**

- What data is needed e.g. visitor numbers, financial data, satisfaction, motivations, etc?
- Related to the events objectives what are the key performance indicators?
- How, when and by who is the data to be gathered e.g. observation, surveys, questionnaires, before, during or after?
- How is it to be analysed e.g. by themes or issues or statistical analysis? What format will be used in the final reporting, for example debriefing meetings or a final report covering all areas? You also need to consider who will be interested in the event and its outcomes? For example the venue, sponsors, Monmouthshire Council, Visit Wales, media – local/national, special interest?



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# Event evaluation and monitoring



## Examples of factual data you may collect include:

- Timing of sales
- Number and value of sponsors
- Sales figures – tickets, merchandise, catering, auction, raffle, etc.
- Number of flyers, adverts, posters, press releases and PR, media utilised, etc.
- Accidents, complaints, etc. reported.
- Adherence to schedules (event planning, implementation and promotion).
- No. of exhibitors / retailers / concessions.
- Financial reports and accounts.
- Visitor and participant statistics – attendance, profiles (exit surveys, tickets collected, etc).



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# Event evaluation and monitoring



- As evaluation is also about process and more subjective elements you can also gather data from the following:
  - Questionnaires and exit surveys
  - Focus groups and interviews
  - De-briefing sessions – venue, staff, contractors
  - Performer feedback
  - Venue feedback
  - Observation and word of mouth
  - Media reports and publicity
  - Social networking and interest websites



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# Event evaluation and monitoring



- Whatever form your evaluation takes and the measures you choose to focus upon you should always seek to generate some outcomes from the evaluation process which could encompass:
  - Report/s on event outcomes for distribution to stakeholders.
  - Report to the media on outcomes and achievements.
  - Recommendations for refinements and improvements to be carried forward to next event.
  - Thanks to staff, participants and other stakeholders for support.



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- **Review Question 1**
  - Describe the principles of event concept design
- **Review Question 2**
  - Describe the detailed planning cycle of the event
- **Review Question 3**
  - List possible characteristics of an event venue



- The **right concept** for a specific event is crucial in making a favorable impression on all stakeholders.
- Comprehensive, **detailed brief** becomes the guiding document for the entire planning process, and defines exactly what you, as the event manager, need to do, and the constraints within which you need to do it.





# Well Done!

## You have completed this unit



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