

We've taken the five phases of event management—concept, planning (i.e., operational, strategic, tactical, contingency), implementation, event execution, and closing—and created a step by step planning guide that will walk you through the process of planning, executing, and closing your event.

**1. Develop Your Event Goals and Objectives**

Determine the Who (audience), What (content), When (timing), Where (location), and Why (purpose) of your event and connect it back to the purpose of how your event fits into the overall event strategy of your organization. Knowing your organization's key goals for hosting this event will ensure that every part of the event is optimized for success.

**2. Organize Your Team**

Identify one key event manager or event chair as well as individual chairpersons for subcommittees, such as:

- Venue management
  - Setup
  - Audiovisual
- Speakers
  - Special guest speakers
  - Plenary and breakout sessions (abstract management)
- Special events/entertainment
- Publicity
- Sponsors and exhibitors
- Volunteers

**3. Establish Your Budget**

Start with your organization's overall event strategy and think about sponsorship, exhibitor, membership and registration revenue, and the associated expenses of holding your event. Align this event with your organization's brand and short/long-term objectives. Ensure your budget meets approval from your committee and organization.

Below are some of the categories you should consider in your budget.

- Venue rental
- Audiovisual
- Speaker fees
- Services and/or labor fees
- Event software
- Food and beverage
- Marketing print and media
- Décor
- Entertainment
- Transportation and accommodations

**4. Create a Master Plan**

Once you have developed your event goals and objectives, organized your team, and established your budget, it is time to start the real planning! Creating your event master plan will allow you to ensure every aspect remains on track, as well as make it easier to coordinate with

committee members. The following list of items will provide ideas to build the core structure of your plan.

- Venue specifications
- Logistical requirements
  - Equipment
  - Audiovisual
  - Food & Beverage
  - Parking & Transportation
  - Insurance
  - Safety – know your venue and train your team on emergency procedures
- Speakers and presenters (invitations and/or call for abstracts)
- Publicity and promotion (e.g., online, events calendars, invitations, social media, signage)
- Registration (deadlines, fees, cancellations, refunds, marketplace, online/onsite setup, payment, onsite staffing)
- Partner and sponsorship management
- Volunteers
- Exhibitor management

A detailed timeline, no matter the size of the event, allows the event manager/event chair and committee to assign responsibilities and follow up on assignments. Accountability is crucial in the success of your event and will ensure that nothing is left undone or missed.

**5. Plan for VIPs, Keynote, and Entertainment**

Thorough planning of the content/entertainment is key to the event's success. Before setting your event dates, ensure your VIPs and/or entertainment are available. If your VIPs and/or entertainment are flexible with availability, proceed quickly with setting a date and moving forward with your venue reservation and contract, simultaneously contracting with the VIPs and/or entertainment.

**6. Set the Date**

The date might already be pre-set for your recurring event; however, if this is a new event, be sure to consider the following before setting your date.

- Allow 4-6 months to plan, if not more, depending on the event and the type of venue and lodging rooms needed.
- Consider potential date conflicts: statutory and religious holidays, as well as school breaks and campus/academic events.
- Ensure availability of key participants: hosts, speakers, presenters, entertainers, and VIP guests.

Being flexible with your dates can pay off big in better rates with hotel room and concessions. Plan 2-3 optional dates as part of your contingency plan.

## 7. Reserve Your Venue

Venue costs are typically the largest portion of your meeting and event budget. Finding the perfect venue equates to finding a venue that is a cohesive representation of your organization's purpose and culture. Below are some questions to consider when identifying your venue needs.

- What type of event are you planning? Is your event a one or multi-day meeting, conference, symposium, tradeshow, retreat, concert, or other special event? Is your event on campus, or will it be held at another location?
- Where will you hold your event? Will it be held on campus? Choosing a desirable destination can increase attendance.
- Does the venue have accessible entrances and elevators? Are there all-gender washrooms? These and many other factors go into choosing a space that meet the needs of all participants.
- How will attendees get to USU or the location of the event? (Time out of the office is one of the top costs of attending an event.) Transportation and parking are also other considerations in the location of the venue.
- What type of venue do you need? Consider the number and type of sleeping and meeting rooms needed.
- How much can you spend? Think about both the event budget and the attendees' budgets—take into account airfare, hotel, transportation, and meal costs.

After you determine your criteria, ensure that your comparison includes items found in the list below.

- AV capabilities
- Meeting space rates and deposit
- Number of meeting rooms
- Maximum capacity of meeting rooms
- Size of meeting rooms
- Other events occurring near your event—potential conflicts
- Average hotel room rates
- Total number of sleeping rooms
- Average daily meal costs
- Parking availability/restrictions
- Security issues
- Area activities and entertainment
- Cancellations fees
- Promotions and concessions

Remember that a venue should not be chosen solely upon pictures and numbers. We advise going to see the venue in person and meeting with the venue staff. When booking off campus venues and negotiating hotel contracts with attrition and cancellation fees, please consider engaging one of our event coordinators to negotiate these off campus venue contracts.

## 8. Market and Promote Your Event

In short, understand who your audience is and drive them to your event with effective marketing strategies that coordinates personalized communication before, during, and after your event. These efforts will generate excitement, increase attendee loyalty, and drive sales opportunities. Technology helps personalize at scale—segment your audience and send different messages to

different types of invitees. Remember: select channels based on who your audience is and meet them there. As you plan your event, answer the Five Ws.

- Whom do you want to reach?
- What do they want to learn and experience? What problem do you solve for them? What action do you want them to take?
- When is the best time to reach them?
- Where do they “virtually” hang out?
- Why should they care about your event?

**Build Your Brand.** Your event is one of many ways your organization builds its brand. Every touchpoint that attendees interact with is an opportunity to reinforce your organization's brand. Below are a few examples of these touchpoints.

- Website (biggest promotional tool and information hub)
- Invitation emails
- Email communication (leading up to and following the event)
- Registration Process
- Name badges
- Event signage (leading up to the event and onsite)
- Mobile event app
- Social media posts about the event (before, during, and after)



## 9. Identify and Establish Partnerships & Sponsors

Key industry/corporate and community organizations can defray the cost and increase potential participation through event sponsorship. Provide clear benefits to the organizations you are reaching out to by creating a compelling case for support. The following ideas are worth considering when looking for partnerships and sponsors.

- Industry/corporate partners can range from national organizations that can sponsor a meal, offer a door prize, or key silent auctions items to local businesses that may be able to provide goods or services, such as printing, flowers, media spots, gift bag items, and lodging.
- Partner with community organizations that might be able to offer a venue and/or assistance with volunteer staffing.

### 10. Determine & Execute Day-of Event Processes

Attendees expect a seamless experience before and during your event. They have committed time to come to your event, so give them a first-class experience.

Begin by creating a detailed timeline of the scheduled daily agenda and the responsibilities of each committee member, which creates accountability and ensures your team is prepared for anything. Below is a simple example of an event day timeline.

06:00: Registration Setup and team/volunteer coordination meeting (Sara, reg team, volunteers)  
 06:15: AV setup for plenary and breakout rooms (Diana)  
 Keynote, Plenary, and breakout presentations (Mike)  
 Catering – breakfast setup (Julie)  
 07:30: Attendees begin check-in with onsite registration  
 08:00: Plated breakfast  
 08:30: Keynote speaker takes the stage (Kelly)  
 09:30: Break  
 AV test for panel (Diana)  
 09:45: Panel takes the stage (Kelly)  
 Quick volunteer (room monitors) coordination meeting (Todd + volunteers)  
 10:00: Catering – break setup (Julie)  
 10:15: Room monitors at breakout rooms (Todd + volunteers)  
 10:30: Networking beverage break  
 AV setup (Diana)  
 10:45: Breakout sessions  
 11:30: Catering – buffet lunch (Julie)  
 Plenary and breakout presentations (Mike)  
 12:00: Lunch  
 AV test for keynote and plenary speakers (Diana)  
 13:00: Keynote speaker 2 takes the stage (Kelly)  
 13:30: Plenary speaker takes the stage (Kelly)  
 Catering – break setup (Julie)  
 14:00: Networking beverage break  
 Room monitors at breakout rooms (Todd + volunteers)  
 14:30: Breakout session  
 15:00: Catering – break setup (Julie)  
 15:30: Networking beverage break  
 16:00: Breakout sessions  
 17:00: Adjourn until tomorrow - all guests must leave the venue by 19:00  
 17:30: Clean up breakout rooms and registration. Prepare for the next day events. (All committee/team members and volunteers)

### 11. Close the Event

Congratulations! Your event was a success and you survived!

Now is the time to prepare for your post-event meetings and closeout your financials. Below are items to consider discussing when improving and proving event impact with your committee and organization during the meeting.

- Performance—reporting basics (revenue, number of attendees by type, session attendance, booth visits)
- Assessing value for exhibitors and sponsors
- Venue and contracted service evaluations
- Attendee feedback
- Committee/team performance
- Marketing ROI
- Identify needed improvements for future events

Providing critical feedback to the venue and services that were contracted for your event will build better and lasting relationships for future events.

### 12. Plan for the Future

Looking forward to the continuity of your event, update the web information to reflect the event's conclusion and/or future dates. As you repeat step 1-11, ensure that you incorporate relevant feedback obtained through evaluations and surveys to improve the event experience through execution, engagement, processes, logistics, and content.