



The Perfect Event Guide

The Perfect Event: A complete list of everything you need to implement in order to organize “The Perfect Event.” From inception to finding the right bureau, to booking the speaker, to final event clean up.

ISB has broken this down into eight time frames to help you better organize the planning process.

16 – 24 Weeks Prior to Event

Conceptualizing the Event

- Goals & Objectives—What do you want to accomplish?
- Type of Event—Conference, Luncheon, Meeting, Workshop, etc.
- Attendees—Who will attend: Sales, Marketing, Management, Executives, HR, Distributors, Home Owners, Entrepreneurs, Professionals, Teachers, Students, etc.
- Staff— Who will head up the project, how much assistance will they need, committees
- Budget – What is a realistic budget? How much do you want to spend? (Remember this needs to be all inclusive: travel, food, beverage, hotel, decorations, A/V, script writing, etc.)

Dates & Location

- Select At Least three Possible Dates - Consider time of year, holidays, weather and activities, competing events, i.e. school activities, professional sports, concerts, etc.
- Select at least three possible locations - Can the location meet all your needs, i.e. meals, entertainment, ease of access, (airport) transportation, internet, sleeping accommodations, parking, offsite activities, etc.
- Request written proposal
- Site visit as needed
- Travel information – Confirm best travel options

12 - 16 Weeks Prior to Event

Formalize Goals & Objectives

- Event Theme/Topics – Have an outline of entire event.

Selecting a Speakers Bureau

- Accommodating your needs—Which bureau is easiest to work with? Will they do all the leg work for you? Do they follow up promptly?
- Understanding your needs – Do they ask questions? Do they suggest the right speaker for your topic, theme and audience?
- Relationship to the speakers—Do they know the speakers and understand their content? Is it the right fit? Can they access the speaker to check availability?

- Client Loyalty Programs—What type of programs do they have to benefit you?
- Team meetings – Do they work in a team environment to come up with new and creative suggestions and ideas?

Finalize Dates and Location

- Firm Date
- Finalize Location – Send meeting requirements to locations. Negotiate pricing, rooms, entertainment, meals, deadlines, request specific rooms, time tables, equipment and all other requirements.

8 – 12 Weeks Prior to Event

Notification

- Formal Invitations – Invite all attendees and guests
- Promotional Strategy & PR – Create ads and marketing pieces to publicize event

Finalize Speakers & Honorariums

- In-house Speakers – All presenters; CEO, President, Marketing Dept, Sales Managers, Committee Chair, Board Chairman, Hospital Director, etc. (Begin writing script, if necessary).
- Speakers Bureau – Professional entity to book and make all arrangements for Keynote Speakers, Celebrities, Entertainment, Workshops etc.

Bureaus must meet these minimum requirements

- 24x7 access to both client and speaker
- Certified consultants on speakers they represent
- Group Collaboration: Several consultants meet to discuss which speaker would be best for the event and why. They then follow up with a conference call with the speaker to finalize.
- Speaker Negotiations
- Speakers Travel Arrangements
- Contract Negotiations
- Technical & A/V Requirements outlined
- Speaker Availability
- Speakers' Videos, Bio, Pictures: These need to be available for you to review
- Interactive website
- Speakers Marketing Materials: Organize books, CD's, DVD's and other materials for handouts at event

Outside Suppliers

- Decorator—If different from event venue staff
- Printer—All handouts & brochures (Request from speaker if required)
- Production—either in-house or out-sourced

Finalize Company Travel Arrangements

- Airfare
- Hotel
- Transportation

Confirm Entertainment and Activities

- Golf
- Outings
- Facility tours
- Fishing
- Stage
- Sound
- Audio Visual Equipment
- Etc.

4 - 6 Weeks Prior to Event

Conference Call with Speaker

- Confirm Theme— Make sure he/she is aware of theme
- Appropriate Material —Verify the message matches that of clients.

Order all Equipment and A/V Requirements

- Microphones
- Lights
- Stage
- Podium
- Sound System
- Projector
- Screens
- Monitors
- DVDs
- Laptop/Computer
- CDs
- Brochures
- Handouts

- Etc.

Select and Order Awards & Gifts

- Speaker
- Top Performer
- Birthday
- Anniversary
- Etc.

Determine Security Needs

- Speakers
- Entertainers
- Gov. Officials
- Etc.

Finalize Food & Beverage

- Plan for a certain number of people. Don't over order; it will cut into your budget
- Map where exhibits and tables will be placed
- Number of tables & chairs, napkins, cups, plates, utensils etc.
- Place Cards
- Get required permits

1 - 2 Weeks Prior to Event

Press Release

- Send to radio, television and newspapers and media

Call Speakers Bureau

- Make sure speaker's travel arrangements are secured
- Have shipping documents prepared for return freight
- Receive travel confirmation from speaker

Confirm all Deliveries and Pick-ups

- Freight
- Have shipping documents prepared for return freight
- People

Confirm all Equipment and A/V Requirements

- Make sure the hotel / venue has or will have all the equipment on site early for sound checks and rehearsals

Confirm Venue / Hotel Ready

- Conference Halls—Reserved & set-up is scheduled
- Hotel Rooms—Make sure the proper amount of rooms are reserved

Staff Meeting

- Identify on-site responsibilities – Everyone needs to know their role for the event
- Dry run

1 Day Prior to Event

Staff Meeting

- Ensure all staff is on-site
- Review responsibilities
- Monitor Set up—Make sure everything you ordered and requested is on site and setup properly
- Contact Sheet – List all volunteers, employees and attendees with hotel room numbers, cell numbers, pagers, etc. stay in contact
- Walk through venue – Final walk through to make sure all is set up properly
- Sound check
- Meet & greet for speaker

Compile Speaker's Requests

- Dressing room – Drinks, deli plate/food. Towels, makeup, etc.
- Meet guest, vendors, speaker and employees at door

Day of Event

Meet Guests, Vendors, Speakers and Employees at Door

- **Have fun and enjoy “The Perfect Event”**

Immediately After the Event

Clean Up

- Pack up all materials – Ship back to office

Financial Reconciliation

- Invoices – Double check invoices and pay them
- Post Budget Performance Review – Double check budget, could save you money for next event, review ROI

Debrief Meeting

- Outcome – See what you can improve on for the next event, what you liked about this event.
- Thank You – Send Thank You notes to all those who participated and made this successful, i.e. speakers, entertainers, creative, marketing, suppliers, key staff, etc.