

The background of the image is a close-up of an event planner's calendar. The calendar is open to a page showing days of the week: TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, and SUNDAY. Each day has a grid for scheduling events, with columns for 'Date' and 'Time'. A silver pen is resting on the calendar. In the top right corner, a black calculator is partially visible. The text 'Planner's Guide' is centered in a white box with a teal border. Below it, the word 'To' is centered. At the bottom, the phrase 'Seamless Event Planning' is written in a cursive font. The entire scene is set against a light-colored wooden surface.

Planner's Guide

To

Seamless Event Planning

A note from me:

Thank you for choosing to take this journey with me!

Planning an event is always unbelievably stressful. Not enough time, limited resources, family expectation or your boss's unrealistic wishes can create seemingly insurmountable tension and wreak havoc on your mental health, especially if your job/livelihood are dependent on the success of the big day.

But planning an event can also be fun and can help you or your company create lasting memories, bring in added revenue, or simply create a deeper connection with your guests. By downloading this guide, you've taken the first step to achieving your desired event, no matter how big or small, without the headache.

It's my honour to give you the steps, tools and templates you need to plan your event, as I would be planning it with you. There's no catch here. I'm giving you all of my secrets. Why? Because outside of having all the information you need to plan an event, there will still be challenges. You may face /be worried about:

1. trying not to forget the flood of minute details,
2. trying not to offend your family/or your superiors when you choose something that goes against their wishes,
3. finding the time, energy and effort to run the marathon,
4. running out of money or having to make sacrifices, and/or
5. not losing your mind in the process.

People hire event planners in hopes of eliminating a lot of these challenges. But if you can't afford one, or you feel up to the task, this guide is the next best thing.

When it comes to event planning, the biggest secret is that your options are limitless. No one wants a cookie-cutter event. Events are meant to be dynamic. The best events are ones that reflect your voice, or the voice, personality, and style of the people/company you're celebrating.

This book and the excel sheet attached are packed with advice on everything from promoting your event to choosing vendors, my planning timeline, my ultimate checklist, my budget template, and more!

You can do this. And if at any time you need a pep talk, advice, or someone to take over where you've left off, you can [contact me](#). I would be honoured to help you make your event magical.

Best of luck,

Sharlyn,

Content Strong™ Communications



EVENT PLAN GUIDE

Your event plan is your map of all the work you're about to do at a glance. It should outline what you hope to do, why you want to do it, what resources you're working with and what success ultimately looks like to you. If you were presenting this to a client, this would be your pitch. The most pertinent information should be presented here, although you may not have all your details nailed down, this is a good way to get your juices flowing.

Give yourself a minimum of 4 months to plan but you may require more depending on the scale of the event. Consider as well if you are planning an event for a larger corporate client. If so, you may need to build in extra time for approvals and buy-in.

Event coordinator contact info: Name, Email, Cell phone

Location: City

Event description / Purpose

- What's the event, why are you producing it?

Date selection

- Consider the time of year, and a time of day that is easy/acceptable for your target audience/guests.
- Consider how holidays and large sporting events for example could impact your event if planned on/around those days.
- Choose 2 or 3 dates to approach your venue with and confirm a date upon venue availability, and the availability of any VIP guests to be invited.

Objectives

- What do you hope to achieve? e.g. More registrations, increase in clients, increase in donations.
- All of your decisions should be driving towards reaching your objectives.

Benchmarks & measurement

- How will you measure the success of the event? e.g. Is it the number of attendees, revenue, feedback, etc.?

- Your measurement should respond to the objectives you outlined. Thinking about this in the planning stage helps you better review and evaluate your event when it's over.

Notable context & event history

- Is this the first time you're hosting this event? If not are their insights from past occurrences, you could or should consider while planning?
- Are there other considerations? For example, if you're hosting a client appreciation event, have your clients been particularly understanding/supportive during a challenging time for your business? If so, this information should be listed here.

Budget

- How much do you have to spend on this event?
- Consider how much revenue you may need to bring in or want to bring as well from ticket sales for example or gifts. How much will you need to recoup what you've spent?
- Miscellaneous costs will arise. Always leave room for the unknown in your budget.

Resources

- What extra resources will you need to make it happen? Do you need to hire a photographer for example? Will you need to order invitations or pay for signage? Will you need to make partnerships or get sponsors to make this happen, and with whom?

Venue

- Are you looking for someplace out of the ordinary, someplace with amazing photo opportunities, or somewhere that has built-in services you may need?
- Perhaps your decision will come down to its centrality/proximity to transportation or capacity. For example, you may be thinking about a hotel that has built-in catering services as well as accommodations for out-of-town guests.
- Consider accessibility and the need for green rooms or breakout rooms.
- Will there be entertainment, and will you need a stage for example?

Target audience

- Who do you want there?

- Will there be any special VIPs to attract others?

Theme, concept & content

- What do you want it to look like? Any particular look and feel?
- Will it have a particular brand, concept or theme that will carry through the entire event?
- What lasting impression are you hoping to leave your guests?
- What content are you hoping to cover?
- How will this translate to decor, food, entertainment and program schedule?

Program/Potential agenda

- What will they do? Are there specific activities you'd like to conduct? E.g. Team building activities, games etc.
- What about speakers or motivators and who would they be?
- Remember to consider how you can be interactive here. For example, will you use live polling, will there be a live web feed?

Promotion/Communications

- How will people know about the event? e.g. online promotion, paid marketing, media relations/attendance, hashtags, influencer posts, registration/RSVP website, formal printed invitations etc.

Key messages

- What do you want your target audience/guests to know before, during and after the event? How will you say it and what wording will you use?
- Planning this early helps you, your speakers, partners, sponsors etc. to use the same messages consistently.

Risks & mitigation

- Are there any risks of doing this event? E.g. negative press, financial loss etc.
- Consider how you'll temper or avoid those risks.

Team

- What type of team will you need to build to get the job done? Consider set up, tear down and day of support.
- Will you be working with anyone special - sponsors, planners?

- Will you need someone to manage RSVPs?

There are a lot of moving parts when planning big events. If this seems like too much work, you can always hire an event planner to manage these elements for you and make it both a stress-free and unforgettable event!



MASTER EVENT PLANNING CHECKLIST

Catering

- ☐ Bartenders/catering staff
- ☐ Beverages
- ☐ Hors d'oeuvres, meal, late night
- ☐ Cake/specialized dessert
- ☐ Vendor meals

Entertainment

- ☐ DJ (& playlist)
- ☐ MC & script
- ☐ Live band
- ☐ Performances
- ☐ Speakers/keynotes

A/V

- ☐ Microphone(s)
- ☐ Projectors and screen
- ☐ Wifi
- ☐ Extension cords/tape
- ☐ Lighting
- ☐ Speakers
- ☐ Laptop/streaming device
- ☐ Streaming platform

Venue

- ☐ Set up/Tear down
- ☐ Accessibility
- ☐ Insurance
- ☐ Logistics/setup and tear down
- ☐ Size
- ☐ Parking & passes
- ☐ What kind of deposit
- ☐ Budget
- ☐ Favor table
- ☐ Floor/site plan
- ☐ Podium

- ☐ Easels
- ☐ Stage
- ☐ Seating plan
- ☐ Media area
- ☐ Green room
- ☐ Rain plan - tenting, canopy

Decorations

- ☐ Centerpieces
- ☐ Pipe and drape
- ☐ Rose petals
- ☐ backdrops/arches
- ☐ Chair rentals & chair covers
- ☐ Tablecloths, napkins, silverware, dishware rentals
- ☐ Flowers
- ☐ Runners, carpets
- ☐ Stanchions
- ☐ Logo wall
- ☐ Pipe & drape
- ☐ Flags
- ☐ Gift table/card box/birdcage

Wardrobe

- ☐ Dress/suit (incl. Shoes, ties, pocket squares etc)
- ☐ Staff uniforms, lanyards

Human resources

- ☐ Officiant
- ☐ Security
- ☐ Parking attendants
- ☐ Greeters/guides
- ☐ Staff/Volunteers
- ☐ Audience/Guest count
- ☐ Attendants/ushers/witnesses

Stationery

- ☐ Invitations & save the dates
- ☐ Menu

- ☐ Name tags
- ☐ Escort cards
- ☐ Printed programs - spelling of names, bios, etc.
- ☐ Directions, maps
- ☐ Thank you cards/letters
- ☐ Guest book

Activities/Program/Agenda

- ☐ Speakers, presenters
- ☐ MC
- ☐ Ceremony

Transportation

- ☐ Limo
- ☐ Car service
- ☐ Taxi chits

Accommodations

- ☐ Hotel group rate
- ☐ Welcome packages & recommendations

Theme

- ☐ Branding
- ☐ Hashtags
- ☐ Event name/tagline
- ☐ Logo
- ☐ Colour scheme

Publicity/Promotion/Communications

- ☐ Programs
- ☐ Posters
- ☐ Signage (directional, branded)
- ☐ Social media - event hashtag
- ☐ Interactivity (twitter wall, voting/webinar software etc.)
- ☐ Webpage
- ☐ Reminders
- ☐ Calendars
- ☐ Media relations

Registration/RSVP

- ☐ Welcome/registration table
- ☐ Staff person
- ☐ Software
- ☐ Dedicated email address/phone number

Photographer

- ☐ Shot list
- ☐ Rain plan
- ☐ Backdrop
- ☐ Permit fee
- ☐ Printed, albums, photobooks etc.
- ☐ Videographer
- ☐ Photo booth, props extra

Sponsors & partners

- ☐ Contracts
- ☐ prizes/swag
- ☐ Marketing/promotion

Gifts

- ☐ Speaker gifts
- ☐ Party favors
- ☐ Raffle prizes

Logistics

- ☐ Minute by minute + orientation package for staff, vendors, exhibitors etc.
- ☐ Permits
- ☐ Emergency/backup plan & first aid
- ☐ Contact list for all vendors + team

Post event

- ☐ Survey
- ☐ Review

QUESTIONS TO ASK VENDORS

Some of the most significant benefits of having an event planner, beyond the obvious stress-reliever, is that event planner knows the most important questions to ask vendors. It's easy to forget questions when you're strapped for time, juggling a flood of little details, or distracted by the sparkle and glamour of your vendor's portfolio.

Below is a list of 121 questions to ask when booking vendors for your event.

Venue - General

1. Banquet room capacity – different set ups?
2. What other events are going on at the venue on the same day?
3. Are the entrance, foyers or bathrooms shared with other events?
4. Do you have an exclusive or preferred vendor list?
5. Do you provide event signage or additional branding?
6. What about easels for use?
7. Is there another event scheduled for your room at a different time during the same day?
8. Is the space soundproof?
9. How long are you able to have the room?
10. What rooms are included? Bathrooms, lounge area, cocktail area, and coatroom?
11. Is an outdoor area included for a cocktail reception?
12. Is the room accessible for disabled guests? What about washrooms and entrances?
13. Are there coat check services and is there an extra cost?
14. Is there space for a green room?
15. Do they provide in-house catering? If not, do they have a preferred list of caterers?
16. Is there a minimum food and beverage spend?
17. Can a food truck be brought onto the premises?
18. Are there extra costs for bartenders, wait staff and security?
19. Do they provide food, and what are the packages?
20. Does the venue provide a cake-cutting knife?
21. Is there a cake-cutting fee?
22. Are there any photograph or video restrictions?
23. Are there any permits we would need to acquire?
24. Is there an option to replace rental fees with a food and beverage minimum?
25. Who will my main contact be pre-event and on the day of?

26. Can items be shipped and stored safely at the venue pre- event date, and how long before?
27. Are there any scheduled renovations or construction and what guarantees do we have it will be finished on time?
28. Can a pre-event walk through be scheduled?
29. Do you provide garbage and recycling bins?
30. How many and what types of electrical outlets do we have access to?
31. What's your lost and found policy?
32. Is Wi-Fi available? Is there an associated cost?
33. What are the A/V capabilities? Is there an extra cost? What about for set up or technical support on the day of, will someone be available and what's the cost?
34. What are the insurance requirements for you and your vendors?

Venue - Set-Up

35. What does a typical layout of the room look like?
36. Do they have a typical run of show template and/or floor plan they use?
37. What time does full breakdown need to have happened?
38. What clean up will the venue take care of?
39. How early are you able to have the room? Can you drop off items the day before, or pick up items the next day?
40. Who is the main venue contact for the day of?
41. Is there anything you need to bring in that they do not have?
42. Will their staff help set up?
43. How many people can sit at one table?
44. Are there booster seats or high chairs available for children?
45. What are the dimensions of the space including ceiling height?
46. Do they provide linens, tables, chairs etc. and what do they look like?

Venue - Parking

47. Where do guests park and how many spots are available?
48. Is there valet?
49. Can you/guests leave cars overnight?
50. Is there a cost to park?
51. What else is going on that night that may make it difficult for guests to park?

Venue - Rain Back-up Plan (for outdoor locations)

- 52. Do they have outdoor covered areas such as canopies or tents in case of rain?
- 53. Do they have indoor space available if you need to move people outside to inside?
- 54. Do they have a generator for power outages?
- 55. Do they have heaters for colder outside areas?

Venue - Decorations

- 56. What decorations does the venue provide?
- 57. When can you start decorating?
- 58. Are there decorating restrictions? i.e. nothing on the walls, no confetti etc.
- 59. What do they use for table settings?

Venue / Caterer - Alcohol

- 60. Does the venue have a liquor license to serve alcohol?
- 61. Does the venue provide the alcohol and bar service?
- 62. What drinks are included in the pricing?
- 63. Can they make a specialized cocktail for your theme?
- 64. Can you bring in alcohol or special cocktails to be served?
- 65. Do they provide a cash bar or an open bar?
- 66. Does the venue hire the bartenders and is there a charge per bartender?
- 67. Do they charge for unopened bottles?
- 68. Is there a corkage fee?
- 69. Are there any restrictions on the type or quantity of alcohol to be served?
- 70. Can wine be given as a party favor?

Venue - Music/Dancing

- 71. Can you bring in a band or DJ?
- 72. What do they have for a sound system? Speakers, microphones, etc.?
- 73. How many people does the dance floor accommodate?
- 74. What time do they allow the music to play until?

Music/Dancing

- 75. When can the band or DJ set up?

- 76. Is there a music licensing fee?
- 77. Are there restrictions on requests?
- 78. What's the playlist deadline?

Décor company

- 79. Can the centerpieces contain candles?
- 80. Is there insurance on the décor in case of damage or cancellation?
- 81. What if there's damage or one goes missing, what's the cost?
- 82. What time do they deliver and pick up? Is that an extra charge?
- 83. How will they/can they make the décor consistent with our theme?

Catering company

- 84. What are the different ways food is served? E.g. Buffet, family style, individual plates?
- 85. Can you arrange for a tasting?
- 86. Is there a cost for a tasting?
- 87. Are drinks provided with the meal?
- 88. Can they accommodate special diets?
- 89. How many choices can you offer your guests for meals?
- 90. How many wait staff will be provided?

Cake bakery

- 91. What time can the bakery deliver the cake?
- 92. How much does a cake tasting cost? And how many types of cakes can you try?

Payment (for all vendors)

- 93. What is the total cost and what is required for a deposit? Are deposits refundable?
- 94. Do they offer payment/installment plans?
- 95. What type of payment can they take – cash, check, credit card?
- 96. What is their cancellation policy and are there exceptions based on exceptional circumstances or emergency situations?
- 97. Can they outline all additional fees, including those related to service, gratuity, cleaning, delivery, security, and waste management?

Transportation company

- 98. How much per transfer?
- 99. What's the maximum amount of guests per vehicle?
- 100. Do they provide signage for buses for example?
- 101. Will they provide the drivers with a map of where the pick up locations are?

Photography & A/V

- 102. What suggestions do they have for locations?
- 103. How quickly will photos be ready?
- 104. What are the packages for print and video?
- 105. Will you get the raw files to keep/own?
- 106. How many hours does the service cover?
- 107. How many photographers are sent out to capture the day?
- 108. Will you be posting anything to social media?
- 109. Do you have standard consent forms, or should we generate?
- 110. Do you have streaming services or platforms we can use and the cost?
- 111. Can you turn around a photos day of for us to share with media?
- 112. Do you need delivery access and set up access to the venue beforehand and how many?
- 113. Do you need a walk-through beforehand?
- 114. Is there someone on your team who can manage the slides/presentation on screen?
- 115. Do you have a projector and screen, TVs and/or laptops we can use, or people to set up and work them?

Overnight Accommodations

- 116. What are the room rates?
- 117. Is there a discount for blocks of rooms?
- 118. Is there a shuttle service to and from the airports?
- 119. Will the front desk staff give out welcome bags if provided?
- 120. Is there breakfast included in the room price?
- 121. Is parking included in the room rate?

DON'T FORGET

- Always look for pictures/a portfolio of their work.
- Always look for/ask for recommendations of their work.

- Always explore at least three vendors to get the best deal/vendor that will work towards your needs.
- Always get a contract – some smaller vendors may want to be paid for the service without one. It's important to get things laid out clearly in writing and agreed upon by all parties.
- Sometimes its best to ask about the charge for an “event,” once you mention it's for a “wedding” the price increases. This is a good tip if looking to negotiate.
- Do research on how long the business has been running, if the vendor has any professional accreditations or education in the field.



SPEAKER INVITATION TEMPLATE

Hello [Name],

You may remember me from/I recently watched a talk you did on/I got your contact information from [name].

I was inspired/moved/interested in a talk you did on [topic] and wanted to let you know about an event we're hosting.

The event celebrates/focuses on/showcases [topic], and if you're interested, we'd like to invite you to speak.

There will be # of other speakers, and we are asking them to prepare for [## minutes] and a QA (optional). We are expecting ## of people, mostly [profession/type of people in the audience] who would undoubtedly be interested in your expertise on [subject matter].

We have these two times slots we're slating for this event, please let me know if you're interested in speaking and if any of these times are preferable.

Currently, we are offering \$\$ stipend to speakers.

OR

Please let me know what your typical speakers fee is.

I look forward to hearing from you and hope we can make this work. Here are some times I'm available to talk about this further!

Best,

Name

Title

Organization

Contact

DIGNITARY INVITATION TEMPLATE

From:

NAME

TITLE

ORGANIZATION

January ##, 202#

To:

DIGNITARY NAME

TITLE

ADDRESS ETC.

Re: Invitation to ORGANIZATION NAME Event on [DATE]

Dear Name,

I know a large part of your work is helping/supporting/promoting/teaching on [topic]. Therefore, we are pleased to invite you to [Event Name] on DATE.

As you may know, [a little about the launch/organization here and link to website].

[something exciting and significant about the event and who will be there]

[Request or information about speaking or photo opportunity].

Event time: ####

Event location: XXXXXXXX

Allotted time for speaking: ##

We are happy to provide your team with any additional information about our event as required.

Please let us know if you are available to attend.

Thank you,

Name

Title

Organization

Contact

