



# **EVENT PLANNING & MANAGEMENT**

**How to Create a Wildly Successful  
Offline or Online Event**

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## Module 1: Planning Your Planning

Every event is unique, even if you plan the same type in the same venue using the same tools and inviting the same audience. And yes, even if you invite the same guest speakers, if your events supports guest speakers.



Each one will come with its own pleasant surprises, techno-glitches and unique problems – but don't let that panic you. Just remember that the most wonderful factor about events is that they are dynamic and alive.

It's like a party: Everyone brings something to the table, and if you've planned properly, everyone will have a great

time. They'll go home with priceless take-aways and memories – and they'll be eager to sign up for your next event.

So how do you ensure each event ends up being wildly successful, no matter what individual problems or glitches occur?

It's all in the preparation.

In other words, you need to plan.

In planning, your goal is not just to set up one successful event, but also how to create or improve on a successful template, routine and method you can truly rinse-and-repeat every time.

### Step One: Endow Your Event with a Strong Identity

If you define creating your event as “putting on a webinar”, you're missing the goal post by miles. A successful event always has a specific goal or purpose and is targeted to individuals passionate about that goal. More than that, however, they are attending an event to get something out of it. After you have identified your event goal or purpose, specifically write down what your guests are expecting to get out of it.

Then make sure you provide it.

Sounds simple, doesn't it? And it can be simple – providing you keep it focused on your goal – and your guests (both event guests and guest experts).

You can also **use the principles you learn here to plan any type of event:**

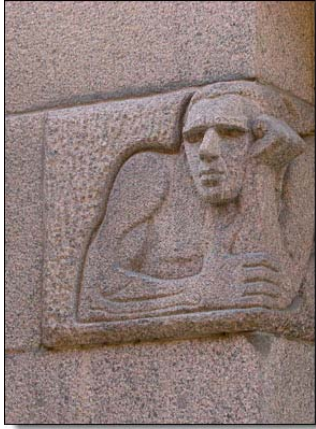
- **Social** (E.g. Weddings, birthdays, family reunions)
- **Entertainment** (E.g. Concerts, comedy festivals, plays)
- **Business** (E.g. Webinar, multi-speaker podcast, live workshop on a business topic)
- **Education** (E.g. Community college course, weekend workshop on how to do something)
- **Exhibition** (E.g. Art exhibition, historical exhibition, fashion show)
- **Conference** (E.g. Graphic Designers Summit, Survivors of Trauma Summit)
- **Trade** (E.g. Trade show, science fair)

In order to plan properly, you need to identify your specific type of event (the work of a few seconds!) But realize that each different type of event will come with its own unique needs – for example, recording software for a podcast or a hall for a banquet.

You may think you have a specific event in mind, but what you need to do first is brainstorm that generic idea to see if you can make it even more focused, targeted – and exciting.

### **How to Brainstorm Your Successful Event**

Sit down in a quiet room, make yourself really comfortable – and have a pen and notepad at hand. Play some soft music, if that helps you get creative juices flowing.



Now close your eyes for a few moments and do your best to visualize your event taking place.

How does that look to you? What's happening? What is your guest speaker talking about? What are your guests eating? What questions are they asking and what comments are they making?

Now open your eyes and jot down ideas that occurred to you as you visualized these scenarios in your mind.

### **Identifying your Audience**

Who was at your event? What did they want? Did this strengthen your relationship with each one?

Knowing your ideal participant (and how much he or she would be willing to pay; and whether or not he or she *would* be willing to pay) is crucial to creating a final, successful outcome.

Now ask yourself these three questions:

- “How can I make this event even better?”
- “Is this the best type of event for my audience?”
- “What can I give them that no one else is giving?”

When you have allowed your event to crystallize in your mind and take on its own identity – when you have “seen” what a successful version of this looks like – it's time to make it happen.

## **Step Two: Create a “Storyboard”**

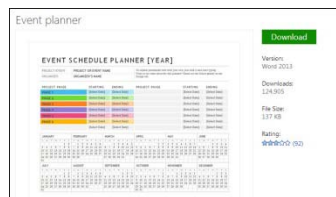
Just as movie writers do, when selling the concept to movie backers, directors and producers, you should create a storyboard.

**Don't skip this step:** Do it and you will find there are fewer gaps in planning and set-up – and if there are, these gaps or omissions will be both easier to see and quickly include at the planning stage.



You can create your storyboard in a format that is easy, quick and comfortable for you to produce: For example...

- **In thumbnail sketches** – just like a graphic designer plans an ad campaign (or cartoon story)
- **In mind-mapping software** – And there are many varieties of mind maps available to suit every preference
- **In MS Word Template format** – You can find all sorts of downloadable [event planning templates](#) for free at Microsoft.



- **With multi-media** – You can also create a Power Point presentation or set up a physical corkboard and pin index cards, business cards, color chips, brochures or photographs on it.

The latter could be photographs of:

- The venue
  - Team members
  - Guest speakers
  - Food you'd like to serve
  - Equipment you want to purchase
- **In point-form text** – If you are more comfortable simply writing things down, do so. Use a Text Editor, if you're more comfortable working on computer; or use a physical notepad – or even a napkin, for this preliminary stage! (Just make sure you carefully keep it and don't give it to your five-year-old to wipe chocolate cake off her nose with!)

Storyboards are not meant to be cast in stone: They are planning tools, and the best ones are fluid, allowing you to insert more data – or take away steps, team members or ideas that won't work.

It doesn't matter how you create your storyboard – just make sure you actually create one!

## Step Three: Set a Viable Budget

Now you have your strong idea and your preliminary storyboard. You're ready to set up the basic elements you need to allow for in every type of event.

The budget for the event determines its sophistication, scope, assets and features. It pre-sets who you can afford to hire, what you can (and cannot) include, and what you can afford to buy and supply.

It doesn't matter how big or small your budget is: Having a set, finite figure to work with actually helps you to narrow down your choices.

The best budgets do allow for some **flexibility**. If you can't be flexible in your bottom-line dollar figure, build it into other budget areas – for example, decide which event areas you can decrease funds for to allow for extra funds to be allocated to other areas, if necessary.

**Create an Excel spreadsheet** for your Event Budget. Provide a separate field for each potential or concrete area of expenditure.

Typical areas to consider might include:

- Venue rental
- Catering costs
- Communication costs
  - Postage
  - Courier fees
  - Delivery charges
- Software costs



- Equipment costs
- Participant supplies
- Printing
  - Invitations
  - Flyers
  - Mailings
  - Posters
- Graphic design
  - Ad artwork
  - Poster graphics
  - Website graphics
  - Sales page graphics and layout
- Rental fees
  - Transportation
  - Equipment
  - Furnishings
  - Contract staff
- Advertising
  - Newspaper or magazine
  - TV or radio
  - Online and offline
  - eZine
  - Social media (e.g. Facebook, Twitter, LinkedIn)

- Google AdSense

You will also need to create more than one spreadsheet:

- A spreadsheet for **projected expenses**
- A spreadsheet for **actual expenses**

Comparing the two will help you more accurately determine your ROI in your post-event analysis.

Finally, don't budget every last penny available. Try to leave a **Contingency Fund** for unexpected emergencies or extra expenses.

## Step Four: Create a Timeline

Now comes the most important part: Putting all these facts together and creating an **event Timeline**, using **milestones** to mark your progress. The easiest way to create an accurate Timeline: Do not start out by filling in any sort of calendar.

Instead, work backwards. Start with the event – and fill in every step that has to happen until you're right at the point you are now.

Take a good look at your Reverse Preliminary Timeline. Do you need to allow more time for certain steps to be brought to completion? Contact speakers, technical staff or contractors earlier? If so, move them to an earlier part of the sequence.

### Identify:

- What needs to be set in motion immediately
- What needs to be set in motion fairly early
- What absolutely cannot be done until the last minute

### Decide:

- Whether or not you are going to use a team or assistant to help you

- Whether or not you will assign a project manager – or be the project manager yourself
- Who is going to take care of what area

From your Reverse Preliminary Timeline, make a list of who needs to be contacted. Fill in that list with current, accurate phone numbers or email addresses.

Contact as many of these individuals as you can.

**Find out:**

- If they can participate
- How much time they need to perform the task you want them to perform (or prepare their speeches, etc.)
- A final date you can agree on for checking in with each other
- How much they charge
- Their preferred payment arrangements
- How often you will meet – online or off
- How you will meet (in person? Via Skype? Within project management software?)
- What you need from them
- What they need from you

Write down or record everything (if you are using Skype or Google Hangouts for meetings).

Adjust your Reverse Preliminary Timeline to the new information, moving people and adding steps they have no doubt pointed out they'll need to take into more feasible positions.

Only when you have done this should you start recording this information on a regular calendar.

**Make sure:**

- That everyone knows where the main event calendar can be found (e.g. “On the bulletin board beside the third-floor cafeteria”
- That everyone has their own working copy of the calendar, if possible – either containing just details relevant to them or with their responsibilities highlighted

Only when you have invested in proper planning can you look forward with confidence to a successful event.