



# **EVENT PLANNING & MANAGEMENT**

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

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## Module 3: Creating Your Dream Team

Trying to plan an event all by yourself is a roadmap to stress and an invitation to disaster. Working with a team of people – or even just the right, competent assistant – will cut the load on your shoulders, leaving you free to continue making money in your regular skill areas. With a team structure, responsibilities are shared. Tasks are magically completed without your personal involvement. And a successful team means that next time, you are positioned to stage another event with even less hassle and headache.



Yet selecting a team means:

- (a) You hand over control of various components to others
- (b) You need to develop a project management strategy
- (c) You need to develop strong communication
- (d) You need to budget paying extra for help

## Step One: Outsourcing and Delegating

When should you consider using contractors and outsourcing for parts of your event? When should you consider hiring new staff or dedicating existing staff? When should you plan your event using a team... and when can you safely do it yourself?

The answer varies in every case, and depends largely on four main factors:

- **The size and/or complexity of the event.** (The bigger the event, the more people you need involved. Some events are so simple, you really *can* plan them yourself!)
- **Your budget.** (Can you afford help?)
- **Your unique skills.** (Are you the best person to perform every single task?)
- **Your time.** (Even if you can do so, *do you actually have the time* to plan the event yourself? Will you lose money if you take time away from your money-making skills to call about renting fifty chairs?)

Take a look at tasks you can outsource or delegate, and decide whether or not there are advantages to doing so. In the overall bigger picture of things, we can chunk that into “departments”.

Make a list of all the **tasks**, **positions** and **categories** you will need to plan for, when creating your event:

- Publicity
- Advertising
- Finance
- Project Manager
- Social media Manager
- Personal Assistant

We can also break it down by individual task:

- Rentals
- Equipment
- Catering
- Graphic design
- Web design

- Printing

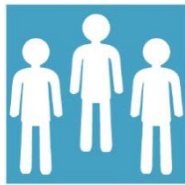
You can also consider hiring a professional to coordinate your event:

- Project manager
- Event planner
- Ad manager

Again, who you hire (and how many) depends on budget plus the scope of the event. In your initial brainstorming meeting (or very shortly thereafter) get your helpers to sit down with you and also brainstorm the type of tasks the event will generate.

And this brings us to the question of exactly who will help you plan your event...

**Using existing staff:**



If you already have staff employed who could take over some or all of the planning for this event, you need to weigh the cost of their salaries against the work they currently do. Will they be able to do both their regular work and squeeze in event planning? Is there one key person who you can assign to this event?

Deciding on staff with proven skills, to whom carrying out the tasks you have in mind would be easy, make this a “no-brainer” decision if any staff member fits the bill. But make sure you outline:

- (a) Exactly what you expect them to do
- (b) When you expect them to do it by
- (c) How often, how, when and where you will communicate and check in

Again, your ROI must come into consideration. The time and aggravation you are literally handing over must be worth the expense of paying them to do event tasks.

If you plan on running similar events on a regular basis and one person above others stands out in helping plan and coordinate the event, consider promoting them to Event Coordinator.



### **Using outsource contractors:**



Your other option is to outsource some or all of the event preparation to freelance contractors who specialize in the particular tasks you wish to outsource.

The downside: Until they've worked with you on more than one project, they have no emotional investment in the success of this event – but be aware they do have other motivations (**financial** – they want to make money – and **reputation-building** – if you like their work, you'll either hire them again or recommend them).

The success of working with contractors depends on three things:

- Making sure you hire someone with proven skills who specializes in the area you want them to cover
- Checking out all references and word-of-mouth recommendations
- How well you “click” together

This latter factor has little to do with whether or not you become great buddies: It has more to do with how naturally and easily you both communicate, and how easy it is to delegate and hand over responsibilities without succumbing to the urge to micro-manage them. But whoever you hire – be sure to book them well in advance!

### **Using volunteers:**



A final, workable option lies in asking for and using volunteers. Depending on the number of volunteers, this may also mean it would be a good idea to appoint a volunteer coordinator.

(If you plan on using volunteers on a regular basis, or there are several, be sure also to commission or create a Volunteer Manual, outlining company principles, practices and values.) The two main advantages of using volunteers are obvious:

- You don't have to pay them a penny

- They are doing it because they want to or believe in your event, which often means with enthusiasm and dedication

The biggest drawback?

- You are not paying them. They are volunteering. This means you cannot demand more time or dictate too specifically how much you need them to be involved. They are doing you a favor, so you must learn to be flexible, go with the flow and appreciate the time they do give you.

If you plan to use volunteers, however, it is important to understand the volunteer mindset. A volunteer may be volunteering for any one or more of many motivations:

- The desire to be needed
- The desire to feel important
- A passionate interest in your event
- A chance to use skills they possess in a meaningful and emotionally rewarding way
- Hope of paid future employment with you
- A chance to prove to themselves that they are still needed
- Alleviating boredom; “getting out of the house”
- A desire to have a finger in every pie

As you can see, motives vary wildly. Understanding your volunteer (or appointing a volunteer coordinator who does) will greatly help ensure that they complete their commitment – and enjoy doing so.

Finally, there is one thing above all others volunteers need and want – whether they admit they do or not: And that is recognition.

Be generous with praise – especially after the event.

Find a way to thank them – and do so. Some suggestions:

- A dinner
- An honorarium of some sort – either cash or a gift certificate or a gift
- Public acknowledgment and praise (mention by name in interviews)
- A recommendation
- A personal letter



- A job

## Step Two: Communication

A team is only as good as its leader allows it to be. One favor you can do for your team: Create a culture of excellent, clear communication.

Do this by making sure each member knows exactly:

- What she is responsible for
- Who she is responsible to
- When work is due
- When each check-in point should be
- When deadlines fall
- Who to ask for help/ask questions of
- What to do if she is running behind
- When you expect updates
- How often you expect updates
- Who the other team members might be – and what areas they are responsible for

There are many business owners who would instantly take issue with that last point. “My business doesn’t require each team member knowing about the other,” said one business owner on this topic recently. “I use all outsourcing freelance people. It’s enough each team member reports to my Project Manager, who keeps track of who’s doing what, when and where.”

### **Don’t Skip the “Welcome” Package**

Nevertheless, if your event involves team members working together, providing a bio page as part of their “Welcome” package helps create a sense of personal connection and solidarity.

Your “Welcome” package bio page should include:

- A photo of each team member (so the others can put faces to names)
- A short blurb outlining what area they will be responsible for and a few key points about their special skills or talents

The aim of these mini-bios should be to create a strong impression of who each team member is as a person and what they bring to your event planning.

And do create a “Welcome” Package. It should include documents supporting CharityNet USA culture and branding practices – some of which it is to be hoped you have already created: For example...

- Style Sheets
- Communication directory
- Team Bios and/or Project Manager bio
- Expectations and Guidelines
- Calendar or Schedule

This latter can just be a simple sheet with email addresses or telephone numbers next to names, with some indication of who to call about what – and when.

Creating such a package can be done in less than an hour (especially if you already have documents such Style Sheets or Communication directories created) and is well worth the time invested. It helps ensure everyone sticks to the same protocols and eliminates confusion.

### **How to Create Successful Team Meetings**

Later on, as you schedule meetings (if your event is large enough to require this sort of check-in) be sure to:

- Create a meeting Agenda
- Appoint a Chairperson for the meeting (if you're not going to do this)
- Designate someone to take minutes

Be sure to let each person know that if they would like to speak about something not yet on the Agenda, they should contact the appropriate team member (e.g. the Chairperson or the Secretary) so that it can be added.

After each meeting, send a copy of the minutes to every team member. All this can be done in a low-key, simple manner – the last thing you want is to go overboard on meetings and paperwork – but following a system eliminates mistakes before they have a chance to be made!

## **Step Three: Interviewing Candidates**

If you have to hire a staff member or freelancer, the protocol should be the same:

1. **Qualify your candidates.** Let them know the full scope of the job, CharityNet USA core values and the skills you are looking for. In short, tell them everything they need to know in order to pre-qualify (or disqualify) themselves – and nothing they don't need to know.
2. **Check all references.** Completely.
3. **Present yourself – in your job ad and in person – in tune with CharityNet USA culture and communication style.** See how the candidate responds to this: Is she over-chatty? Over-familiar? Too stiff and formal? Bored? Too brusque? While a different communication style is not necessarily the Knell of Death, it can be a valuable tool in assessing who is going to fit in with CharityNet USA culture and who is not.
4. **Present your expectations and requirements clearly.** You don't need to go in detail, but better they know now if you have a no-missed-meetings policy than later, when you both discover your meetings conflict with their Volunteer Reader night at the local library.
5. **Know what you can be flexible about – and what you can't.** Keep it under your hat: Don't spell it out. But when you find yourself interviewing a candidate who can't accommodate your meeting schedule but who is otherwise perfect for the job, be prepared to bend a little (as long as the other team members won't be hurt by the exceptions you make).
6. **Be positive.** If you are positive, positive candidates will delight you – and shy ones will blossom into showing you their true colors.

Hiring the right person means learning to become a good judge of who will fit in and who won't. Will experience and skill level are “must-haves”, at the end of the day, looking for someone who works well both independently and as a team member is vital.

## Step Four: Handling Your Event Project Management

If your team consists of more than you and an assistant, you may want to start thinking about:

- A project management system
- A project manager

## EVENT PLANNING & MANAGEMENT: HOW TO CREATE A WILDLY SUCCESSFUL OFFLINE OR ONLINE EVENT

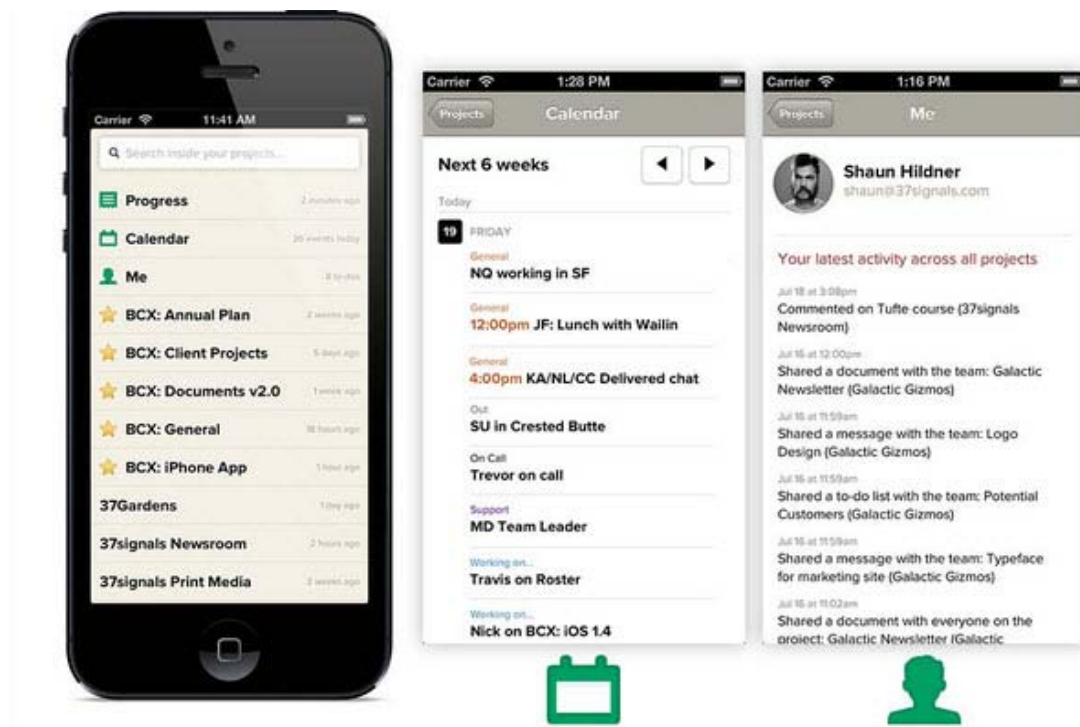
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If you do decide to hire or outsource for the latter, be sure to choose someone with proven experience in (and a clear understanding of) project management – which is a separate art unto itself!

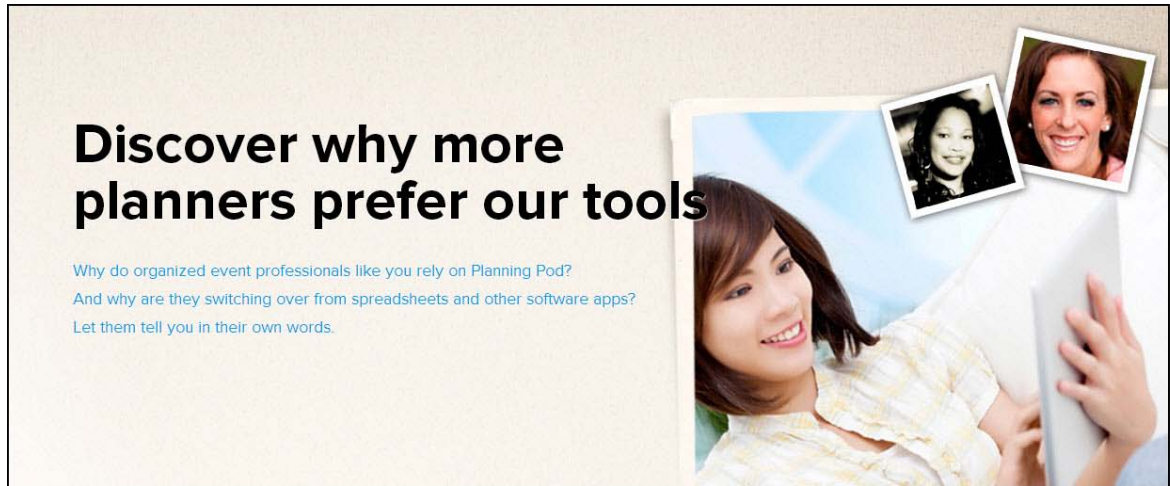
If people need to share files, make sure you use a cloud-based system where the right people can retrieve the right files from the right place at any time – day or night.

If you plan to use your team for more than event management, a more general project management suite might be in order – such as [Basecamp](#), which starts at \$20.00 per month.

And Basecamp for iPhone syncs with iOS 7 on both iPhone and iPad.



[Planning Pod](#) is a good system if multiple people have to grab graphics, reports, .PDFs or see where certain stages have reached.



This software suite is dedicated strictly to event planning and management, and is inexpensive, streamlined and easy to use. And be sure everyone is on Google Calendar – in fact, [create a Google calendar](#) specifically for your event.

(Be sure to share it with everyone on your team and show/tell them how to import a copy.)

Finally, don't overcomplicate things. Try to keep your team to a minimum – lean and mean (well, maybe not so mean): The simpler your team structure and systems, the easier and more foolproof effective event creation.

In our final module, we will take a look at changing event trends in 2014 and focus on both guest speakers – and guests.