

“Ten Steps to Managing a Successful Event”

**Canadian Federation of Apartment
Associations**

June, 2007

Edmonton Alberta



Skills assessment – for the Event Coordinator/Manager

Ability to work under pressure
Attention to detail
Creative
Decisive
Discipline
Establish & meet deadlines
Flexible
Good Communication skills
Good public relations skills
Innovative

Skills assessment - continued

Leadership qualities
Listens
Logical thinker
Organized
Patience
Planner
Pleasant temperament – “remains cool”
Prioritize
Provides good “customer service”
Requires minimum supervision
Resourceful
Team Player

Hints to remember when planning your “Special Event” -

You are not alone!
Know your Resources
Take Control
Establish Committees
Confirm, Confirm, Confirm
Follow-up, Follow-up, Follow-up
Have a Plan – Critical Path
Success comes with Experience

Standards Defined -

A typical standard statement might answer the questions: “What does the special event coordinator do?”, “How well?”, “How much?”, and “How often?”, “What skills and knowledge are required?”
Occupational standards should be able to address the broader question “How would one know if someone is performing this activity to the level expected in their occupation or industry?”

Why standards were developed -

- Heighten the image of the event industry professionals,
- Clarify career paths within the profession,
- Enhance career mobility,
- Give clear direction to employers when hiring, training, and evaluating professionals,
- Provide a framework for curriculum development,

Why standards were developed -

- Assist industry to address labor shortages,
- Provide a basis for the determination of compensation,
- Assist governments to target training funds,
- Facilitate the attraction of new individuals to careers in the industry.

The MAGIC FORMULA for a successful event!



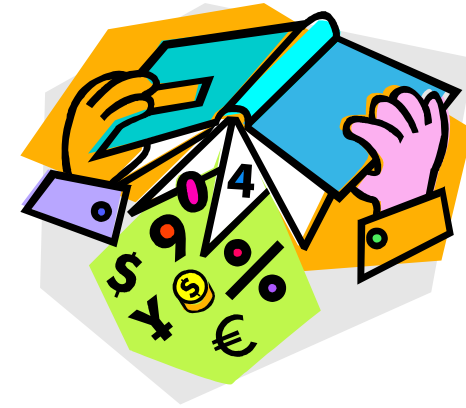
Six Functions and Ten Steps of “Managing a Successful Event”

- A. Administration
 1. Business Plan
 2. Critical Path
 3. Evaluation Strategy
 4. Financial Management Plan
- B. Event Logistics
 5. Event Program
 6. Site Plan

Six Functions and Ten Steps of “Managing a Successful Event”

- C. Marketing
7. Marketing Plan
- D. Risk Management & Liability Issues
8. Risk Management Plan
- E. Human Resources
9. Human Resource Management Plan
- F. Professionalism & Ethics
10. Professionalism Ethics, Standards
and Values

Step #1: BUSINESS PLAN



Components of a sound Business Plan

A. Mission Statement – Provides a sense of direction and purpose for the event. Should be focused upon while planning each step of the meeting or event.

Components of a sound Business Plan

B. Goals – Statements of interest which will be different for the organization, the participants, the sponsors, visitors and the community. What you plan to achieve by holding your meeting or event. Written in general or generic terminology.

Components of a sound Business Plan

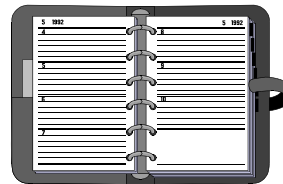
C. Objectives – Results must be – realistic, achievable, measurable (use numbers), flexible, written and reflect and respond to economic realities.

Components of a sound Business Plan

- D. Administration**
- E. Logistics / Operations –**
- F. Marketing –**
- G. Human Resources –**
- H. Event Evaluation –**
- I. Leadership and Management –**
- J. Financial Planning –**
- K. Planning Cycle -**
- L. Resource Development -**

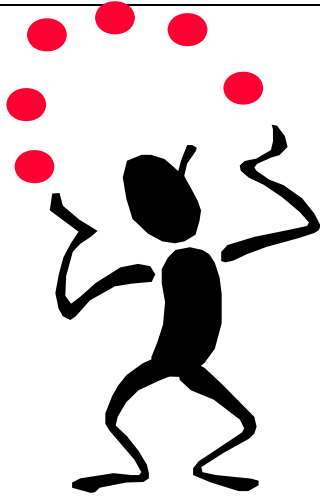
Step #2: CRITICAL PATH

- A. Critical path – sequence of steps and time lines**
- B. Critical date – prescribed deadlines**
- C. Time line – will specify order in which tasks are to be competed**



MAJOR TASK: Program Development	RESPONSIBILITY: Program Committee											
MINOR TASKS	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Determine workshop topics	XX											
Source "Platinum Speaker" – extend invitation		XX										
Source workshop facilitators – extend invitation		XX										
Source Keynote Speaker – extend invitation		XX										
Source "Opening Presentors" – extend invitation		XX										
Request/discuss workshop/presentation content outline		XX										
Develop session info description for brochure.							XX					
Forward Letter of Agreement			XX									
Request AV requirements, bios and workshop description for program									XX			
Confirm hotel accommodations								XX		XX		
Confirm transportation						XX				XX		
Source speaker "gifts"										XX		

MANAGE MULTIPLE PRIORITIES



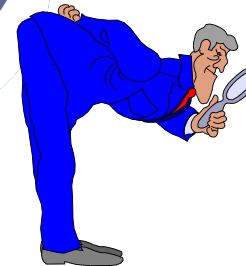
HOW TO MANAGE MULTIPLE PRIORITIES

1. Stay focused on the mission, goals and objectives
2. Pay attention to details without losing sight of the overall plan
3. Continually communicate with committees, sponsors, vendors, board, chairs etc.

HOW TO MANAGE MULTIPLE PRIORITIES

1. “Chunk” tasks into smaller, manageable components
5. Delegate tasks by matching skills, expertise and strengths
6. Continually evaluate and monitor to ensure fulfillment of mission, goals and objectives

Step #3: EVALUATION STRATEGY



Measurements along the way providing firm data to assess the success of the special event, conference or meeting. Purpose is to determine if changes are required.

EVALUATION STRATEGY

What items of the conference, meeting or special event can be evaluated?

EVALUATION STRATEGY

What methods can be used to evaluate?

- A. Telephone
- B. On site observance
- C. Interviews
- D. Meetings
- E. E-mail
- F. Surveys
- G. Evaluations completed by attendees

Step #4: FINANCIAL MANAGEMENT PLAN



FINANCIAL MANAGEMENT PLAN

Define –

- A. Budgets
- B. Fixed Costs
- C. Variable Costs

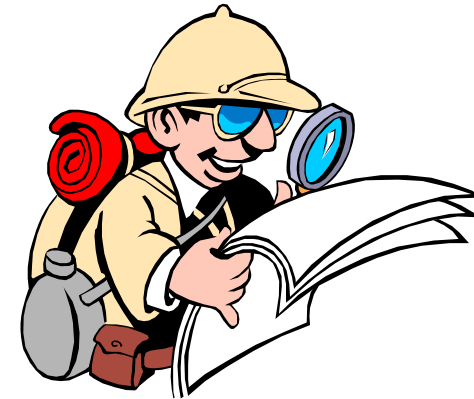
Step #5: EVENT PROGRAM

Implement the event program

- A. Review components of program considering budget
- B. Set agenda considering logical sequencing of events and time lines
- C. Coordinate event and follow up as required



Step #6: SITE PLAN



SITE PLAN

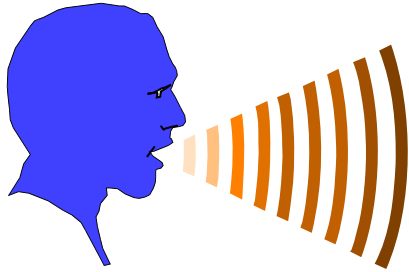
What are the elements?

- A. Develop the site plan
- B. Utilities
- C. Waste management
- D. Communication systems
- E. Site set up
- F. Staging
- G. Seating arrangements
- H. Special needs services
- I. Parking
- J. Control points

SITE PLAN

- K. Registration area set up
- L. Information area set up
- M. Accreditation system
- N. Transportation system
- O. Event program support
- P. Décor design and theme
- Q. Security and emergency services
- R. Food services
- S. Beverage services
- T. Other services.

Step #7: MARKETING PLAN



MARKETING PLAN

What are the elements?

- A. Develop the marketing plan
- B. Determine the print material
- C. Develop the merchandising plan
- D. Develop the souvenir program
- E. Develop public relations and publicity strategies
- F. Prepare public relations media plan
- G. Develop and implement hospitality program
- H. Develop advertising strategy

MARKETING PLAN

- I. Issue media release
- B. Prepare media packages
- K. Submit feature articles for publication
- L. Schedule a media conference
- M. Arrange a media blitz
- F. Attend trade and consumer shows
- G. Set up contests
- H. Organize volunteer and sponsor appreciation programs

MARKETING PLAN

Determine strategies to match objectives such as:

- 3. Direct marketing vs direct selling:
Reaching a targeted market directly thru phone, face to face ie telemarketing
- 6. Promotions:
Incentives, sponsorships, prizes i.e. early bird registrations, discounts

MARKETING PLAN

1. Public relations:

Activities undertaken to promote a favorable image i.e. associated with a charity or cause

4. Advertising:

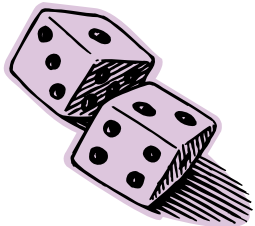
A technique designed to attract attention, develop interest, create desire, invite participation and increase awareness i.e. media ads for newspaper, TV, radio, billboards. Often paid for.

MARKETING PLAN

1. Publicity:

Free media coverage i.e. media conferences, articles written for publication which are printed, PSA's

Step #8: RISK MANAGEMENT PLAN

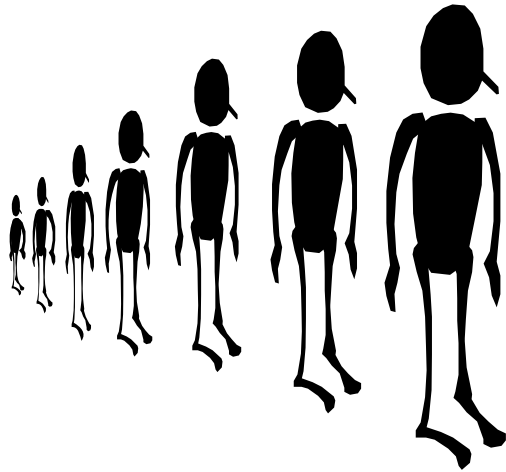


The plan will identify the safety techniques and tools that need to be in place for eliminating or reducing risks. It will also provide for the transference of these risks.

RISK MANAGEMENT PLAN

1. What is a hazard?
2. What is a risk?
3. What is risk management?
4. What is exposed to loss or risk?
5. What are examples of risk?
6. What are the elements of a risk management plan?
7. What are the insurance options?

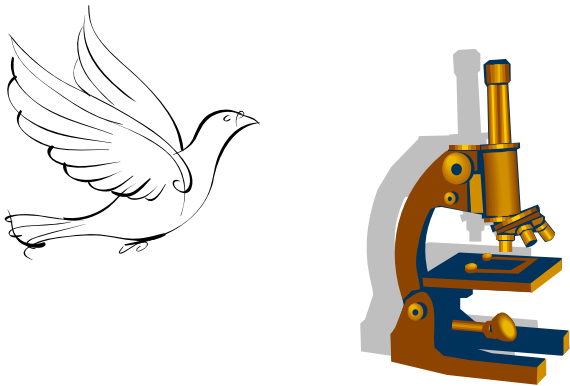
Step #9: HUMAN RESOURCE MANAGEMENT PLAN



HUMAN RESOURCE MANAGEMENT PLAN

1. Develop a plan
2. Implement guidelines by establishing policies and procedures
3. Ensure policies and procedures are communicated to staff and volunteers
4. Ensure adherence to policies and procedures
5. Establish a motivational environment using rewards and incentives

Step #10: PROFESSIONALISM & ETHICS



PROFESSIONALISM & ETHICS

Professionalism is revealed in an individual's attitude and approach to his or her work and is commonly characterized by respect, courtesy, punctuality, dedication, fulfilling commitments, reliability, responsibility, diplomacy, integrity, knowledge, organization, empathy, appropriate appearance and demeanor, sensitivity, accessibility, efficiency and leadership.



PROFESSIONALISM & ETHICS

Ethics reflect how we apply our values in everyday activities. Ethics relate to that dimension of thought and behavior which is guided by standards and principles or right conduct.

Some essentials of ethical conduct are honesty, integrity, fairness, impartiality, prudence, promise keeping, fidelity, caring for others, respect for others, responsible citizenship, pursuit of excellence and accountability.



Thank you!

**Good luck and much success
with all of your meetings
conferences and special
events.**