

NAIS Webinar – Event Planning

Host: Erica Zematis (Executive Assistant for NAIS)

- Assistants manage events of all sizes, from meetings to big events
- Three main impacts:
 - Time
 - Scope
 - Cost
- Scope Creep – When the scope of the event becomes bigger than you had originally planned
- Time Consuming Tasks
 - Participation Management (57%)
 - Venue Finding (40%)
 - Coordinating Vendors (38%)
- Headaches in Planning Phase
- Challenges in Concept and Planning Phase
- Time Consuming Tasks – Solutions
 - Pre-event surveys
 - Variety of food options
 - Interactive sessions
- Headaches in Planning Phase – Solutions
 - Contingency plans
 - Hold regular planning meetings
 - Site visits and rehearsals
- Challenges in concept phase – Solutions
 - Use scheduling and project management tools
 - Flexibility when things need to change
- What are the goals of your event?
 - Fundraising
 - Networking and Community
 - Celebration
 - Raise awareness
 - Recognition
 - Business
 - Learning
- Event Planning Checklist – General Guidelines

- Purpose and goals
- Date and time
- Budget
- Catering and vendors
- Marketing
- Prep for the event day
- Create contingency plans
- Resources: Eventbrite / Checklist.com / Adobe
- Generative AI
 - Questions to ask yourself
 - Efficiency – Will AI make this faster?
 - Innovation – Will AI give me some new ideas/
 - Generative AI – Use to research event venues / processes / improve efficiency
 - Human Experience – Create personal touches and VIP experience
- Staying on Budget
 - Ask leads what they have in mind for their budget
 - How many attendees would we need to break even on our event costs?
 - What are the priorities of the event?
 - Determine must haves vs. nice to haves
- Tips to Manage Your Budget
 - Set a budget and stick to it
 - Get quotes
 - Track all expenses
 - Plan for unexpected costs
 - Ask for donations
 - Connections to families and faculty that might be able to offer things
 - Ask vendors for discounts and donations
 - Hold meetings at “off” times to avoid peak season pricing
 - Choose times of day that would allow people to drive in rather than paying to stay overnight
- Contract Negotiations
 - Have your leader review your contracts
 - Is the price on the contract the agreed upon price?
 - Does it include any discounts that you discussed?
 - Does your typical mode of payment match the vendor’s requested mode of payment?
 - Cancellation policy? What ifs?
 - Does your org require getting insurance from the venue?

- Ways to Elevate an Event
 - Music
 - Lighting
 - Tablecloths
 - Entertainment
 - Flowers
 - Favors
 - Catering / Food
 - Wait staff
 - Bartenders
 - Dress Code
 - Invitations
 - Chairs, tents, plants
 - Technology – QR codes, social media, hashtags, etc.
- Know Your Attendees
 - Small groups – get specifics on dietary restrictions etc.
 - Large groups – cover most general dietary restrictions
 - Name badges and table tents
- Communication
 - Save the Date > Key details
 - Invitations > Event details
 - Reminders > Pre-work / event agenda
 - Thank You > Follow up / share docs and photos
- **Managing Unexpected Situations**
 - Caterer doesn't show up
 - Not enough seats for Graduation
 - Weather too hot or cold for event
 - Solution? Stay calm, learn to pivot and adapt
 - Use your evidence to request a refund
 - Emails and other documents that can prove your case
 - The crisis is not usually as bad as it seems in the moment
 - Adapt / reflect / follow up
- After the event
 - Follow up with attendees
 - Thank participants
 - Reflect on your goals – did you achieve your goals?
 - Send out any promised materials to attendees
- More Resources

- AI image generators for photos
- Canva / Designer for MSFT.com
- Visme – marketing and other visual content with an AI designer
- Jotform – over 2,000 free forms
- Google Video Poet – can turn an image into a video
- What can you do to mitigate situations where people RSVP yes and don't show up?
 - Send reminders
 - Ask if they are doing ok?
 - How often do you send reminders?
 - Get a really accurate headcount
 - Communicate that there is a cost to buying food
 - Always roll with the issues
 - Personal touch – following up with no-shows can go a long way
- If you suddenly had to cancel an event, what would you do?
 - Communication – Internal
 - Confirm with HOS / event leader – do we have to fully cancel or can we pivot?
 - Guests (email, social media, post signs at venue)
 - Check contracts, confirm losses and clauses (force majeure)