

The Event Management Textbook



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CERTIFIED EVENT MANAGEMENT EXPERT

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Chapter 1: What is an Event Management Expert?

What is an Event Management Expert?

Event management experts are individuals or teams responsible for establishing dates, goals, objectives, themes, venues, staffing, marketing, décor, transportation, food and beverage, entertainment, on-site logistics and management for an event. These events range from weddings and sporting competitions, to political fundraisers and corporate meetings.

As an event management expert, you will often work closely with companies, non-profits, government entities, and other types of businesses. Whether you choose to specialize—focusing on meeting or wedding planning exclusively for example—or provide services for a wide range of event types, you will need training, experience and a comprehensive understanding of the art and science of bringing people together for a common purpose.

Event Management Objectives

For every event, there are a number of objectives that must be incorporated in order for the event to be successful. The first objective is to identify the event's primary goal, and any secondary goals. For example, the primary goal for a company building a hybrid vehicle might be to introduce vehicle to as many people as possible. Showcasing the hybrid vehicle or demonstrating it for a period of time at the main entrances of major science and industry museums nationwide can do achieve this primary goal. A secondary goal for this touring exhibition might be a “green” event initiative in which the sales mission is augmented by demonstrating a green car while using a paperless planning and management system.

Once the overall goal or goals of the event itself are established, the event planner works with the client to develop the overall vision for the event. The event vision for this hybrid car tour includes, but is not limited to:

- Choosing event dates and venues where other exhibits are drawing large crowds and the chance of conflicting events or inclement weather limiting attendance are unlikely.
- Determining how much time will be required for transporting the vehicle from venue to venue.
- What the display will look like; should it be futuristic or evoke an environmentally friendly and healthy feeling through use of greenery and running water.
- What will the presentation be? Will there be a canned presentation running on a video screen, or will the vehicle be attended by knowledgeable models that will simply chat with visitors and answer their questions?

Once the overall objectives of the event are targeted and fleshed out, the event planner will nail down the specifics of the event process and implementation.

Responsibilities of the Event Management Expert

For the hybrid car tour example or any other event, it is the event management expert's responsibility to make sure every detail is included in the plan and process. At the very least, every event planner, for every event, is responsible for:

- *The Plan*: The plan is a written document with timelines and checklists that relates to all of the steps that need to be taken achieve the vision of the event. The plan can forecast days or even years ahead depending upon the details of each particular event. The plan will serve as the blueprint for the event.
- *The Budget*: Perhaps the most critical element of the plan is the budget; it establishes how much can be spent and drives the entire event planning decision process.
- *The Location and Venue*: A well-chosen location and venue will enhance the experience of attendees and reflect the goals and vision of the event; conversely, a poorly chosen location can ruin an event.
- *The Agenda*: Even simple events need a schedule of activities and responsibilities during the event, whether this includes a roster of speakers and topics, or the staff scheduling at an exhibit booth.
- *The Contracts*: Contracts are an important and necessary requirement for every event. Each contract must be negotiated and signed by the planner and any and all venue and service providers.
- *The Permits and Insurance*: Event planners need to research and determine the proper permits and forms of insurance that are needed for each and every event. Without the proper permits and insurance authorities can close an event down without notice, at any time.

- *The Staff*: The staff of an event can be made up of both paid and volunteer staff. Both paid and volunteer staff members are critical to a good event and should include specialists in financials, legalities, risk management and other key areas.
- *The Talent*: The talent can be persons such as speakers, models, and other areas of entertainment. The talent will each need to be identified and contracted with well in advance from the date of the event. It will be the event planners responsibility to make sure the talent receives regular reminders of their commitment and special services on-site.
- *The Marketing*: The marketing for an event includes items such as invitations, securing press coverage, and additional marketing in the form of both printed and digital ads and promotions.
- *The Transportation*: Transportation is one of the many responsibilities of the event planner. For example, destination events require the event planner to make sure that the travel is safe, easy and comfortable. In addition, transfers from location to location during the event are also part of the transportation responsibilities for the event planner.
- *The On-site Logistics*: Once the event planner and management team arrive at a venue, all the facets of the plan and on-site logistics must come together seamlessly in order to give the attendees the best possible experience.

- ***The Successful Event:*** At the end of the day, it is the event planner’s responsibility to make each event a success in the eyes of the client and all the attendees.

Event Management Qualities

There are dozens of qualities that an event planner and manager must have in equal measure. Depending on the event, some qualities may be called upon more than others. Here are a few key qualities:

Communication Skills	Organizational Skills	Motivational Skills
Time Management Skills	Managerial Skills	Stamina
Passion for Perfection	Level Headedness	Creativity and Vision
Multi-tasker	Team Player	Detail Oriented
Command Respect	Flexible and Nimble	Decision Maker

Ethics for Event Management Experts

There are a number of ethical issues that arise when you plan an event. During the planning stages, you may be “romanced” by destination managers. Destination managers are people who are in the business of selling event venues and space, encourage site selection visits—or familiarization (fam) trips—by putting you up for free and perhaps wining and dining you. While this can be fun and very useful for event planning purposes, if you really aren’t planning to use a certain venue, it is unethical to take a familiarization or “fam” trip to it.

Often, vendors will offer event planners incentives like gifts or front-row tickets to an event. This is not an

unethical practice necessarily. Showing appreciation for a business associate by gifting them is fine as long as it is within reason, and the gift is not used to garner favour from the event planner. It is up to you, the event planner, to draw an ethical line in the sand where incentives are involved.

The same considerations should be given to rebates and kickbacks. While receiving room block rebates can really help your budget, you don't choose a hotel, for example, that really isn't ideal for the event's purposes just because they offer a rebate incentive program.

Current Trends in Event Management

The event management industry is highly competitive. In the United States as of 2010, the \$7 billion event management industry was comprised of about 3,500 companies, the top 50 of which grossed approximately 45% of the industry's revenues. However, the U.S. Bureau of Labor Statistics (BLS) indicates that the industry will grow 16% in the next decade and employ approximately 66,000 meeting and convention planners by 2018. By 2005, the wedding planning industry was about 15,000 people strong; although BLS does not compile detailed statistics about this industry sector, they do combine data on wedding and funeral professions and which indicates steady growth there as well.

The Bureau of Labor Statistics 2010 figures indicate meeting and convention planners average between \$35,000 and \$58,000 a year. As of 2008, specific salary breakdowns by client industry include:

- Management, scientific, and technical consulting services: \$49,600

- Business, professional, labor, political, and similar organizations: \$47,670
- Other support services: \$44,290
- Colleges, universities, and professional schools: \$41,860
- Traveler accommodation: \$41,470
- Highly specialized industries like wedding planning don't publish exact salary data because some planners only do one or two events a year and may only make \$5,000 while others do dozens and make over \$250,000.

In addition, the BLS statistics additionally indicate that employers viewed event planners with bachelor's degrees and event management certifications more favorably. Furthermore, the opportunities for freelance planners and event planning companies are increasing as businesses try to keep the overhead of in-house event planning down.

Event Types

There are thousands of different types of events that are used in all industries and for many different purposes. People come together to be entertained, pulled together by shared interest and the adrenalin rush of crowd emotion. Event types range from horse races to NASCAR, and professional football games to spelling bees—each of these events are different forms of entertainment. People are drawn together at social events to share their affection for each other and indulge their personal connections. We celebrate milestones in our lives by gathering at events and parties, and we sometimes gather just to share a drink, a

bite to eat and the stories of our lives—not for any specific reason other than to just enjoy each other’s companies. Sometimes people meet out of force of habit... or “just because.”

Business people typically gather to exchange ideas, show each other appreciation, improve morale, communicate issues, increase sales, solve problems, and even just because the boss makes them. Conversely, individuals will convene for educational purposes. At these types of events, learning happens through communicating issues, introducing new tools for success, sharing personal knowledge and professional experience, and doing coursework that results in certification or licensing. We will discuss each of these areas in more detail.

Business Events

Business events are almost always designed and held to improve a company, organization or government entity overall, or to focus on a certain aspect of it—new technology for example—and improve employee capacity to learn, implement and perform it. Business groups worldwide are recognizing and embracing the fact that people assimilate knowledge and produce better when they are happy and having fun. The following is a list of the major business events, the purpose served, and a suitable styling idea for each entry:

- **Board Meetings**: Boards of directors are responsible for giving direction to and overseeing companies and organizations. The boards of directors oversee policies, goals, chief executives, finances and budgets and fair stakeholder practices. When they meet it is focused a meeting with objectives and goals. Board meetings often require a secure and private conference room facility with comfortable chairs, ample table room,

refreshments, any technology requested, ready access to a messenger or errand runner, and a business services center. The business meeting décor typically consists of a centerpiece or floral arrangement on a small side table.

- *Conventions*: The variety of convention types is limitless. Conventions typically draw large groups of people, so housing the participants near the convention is important. The styles of the events are everything from austere to elegant as dictated by the organizers' visions.
- *General Meetings*: Many corporations and non-profit organizations hold annual general meetings where executive and management level employees meet for a few days to set direction for the business, socialize and network, team build, give recognition and boost morale. The location of the general meeting should have ample small meeting rooms and a ballroom for a cocktail party and/or dinner.
- *Intensives*: Intensives are typically leadership and team-building events that build up attendee stamina and confidence while improving their problem solving and team-playing skills. Many such events feature outdoor rope, zipline, and climbing wall courses and even for outdoor survival training. These events are well suited to outdoor training or military facilities, and attendees often bivouac in tent communities.
- *Retreats*: Retreats are, by definition, opportunities for a group of people to “get away from it all” and focus

specifically on one or two elements of their personal or professional existence. They are sometimes designed to help overworked executives simply relax and feel whole again; others focus on improving a skill with emphasis day in and day out on issues like negotiation, communication and motivating others. Any place that is completely out of the ordinary for the participants is an ideal location for a retreat event.

- *Sales meetings*: Sales meetings can be tedious and exhausting due to the focus on certain products or services and train the sales associates to know the product or service, embrace it, communicate its benefits and prepare to launch a successful sales campaign. Managers often choose resort setting for these meetings because giving the associates fun outlets as rewards to their hard work achieves two goals: the experience makes them happy, hence more effective and it also builds loyalty.
- *Shareholder meetings*: The shareholders of a company typically meet annually or as directed for each particular company or organization. When these meetings occur, the shareholders should be recognized for their contribution to the financial stability and management of the corporation. For example, some corporations choose to charter a yacht for such a meeting; it's private and luxurious, and once the business is done, the shareholders can be thanked with fine dining, water sports, the luxury of private cabins and an exceptional staff and an opportunity to enjoy each others' company in a purely elite-escapist environment.

- Teleconferences/web conferences: Teleconferences also referred to as teleseminars, allow people to convene even if some of them are in another city or country at the time of the meeting. Teleconferencing uses audio and video technology to bring a person or group of people into another group meeting by audio only or audio/video. This meeting technology is always less expensive than transporting one group to another far-away destination, paying for lodging and providing meeting space. Contemporary teleconferencing technologies include online computers, telephone service, Voice over Internet Protocol (or VOIP) and various search engine company software applications. All that's required for this type of meeting is the appropriate technology online and conference rooms or facilities for the participants.
- Webcasts: Best described as Internet broadcasting, webcasts allow any number of people anywhere in the world to watch a "program" live or access it on-demand. Webcasts seldom feature any interactivity between viewers, but if a company or organization needs to inform an unlimited number of people about just about anything, they can use webcasting to transmit educational resources and deliver presentations to the webcast attendees at their individual desks or offices.

Educational Events

Educational events have one common goal: teach attendees something new. What sets them apart are factors like size and duration of the event, hands-on participation and the depth of material that will be covered. The following is a

listing of the primary categories of educational events and examples of educational event goals and styling:

- *Classes & Seminars*: Businesses and special interest groups commonly utilize classroom-teaching environments for educating employees about advances in their field or introducing new information relative to a groups focus. When these classes cannot readily be held via Internet broadcasts, airport hotels can be good locations because attendees can essentially fly directly to the meeting venue. Classroom style seating is preferred for these events so that each attendee will have a workspace in front of their seating. In addition, it is essential that the proper audio and video resources are available for the event. Airport hotels can be somewhat remote, so event planners should make sure to provide meal and entertainment opportunities for guests.
- *Clinics*: Clinics typically require hands-on participation by attendees. For example, a group of animal vets might convene to learn how to perform dental radiography on a wide variety of animals and then make dental repairs based on x-ray findings. In this instance, the best venue for the clinic would be on-site at a veterinary hospital that is fully equipped with state of the art equipment. Clinics typically do not take place at hotels, so care must be given to accommodations, food and beverage and transportation of the guests.
- *Forums*: Forums give all attendees at an event, a chance to participate in discussions of topics typically lead by a panel of experts. For a small group, a u-

shaped setup in a meeting room is sufficient. However, if the group is extremely large, in the case of a big political rally for example, a coliseum might be the best option. Those who only want to observe can be seated in the outer rings of seats, while those who plan to speak can be closer to the central dais. In this arrangement, large monitors and a great sound system need to be used so all attendees can see and hear the action, and microphones need to be accessible to blocks of seating all around the lower rail. It might also be essential to provide the moderators with a list of participants and topics/questions ahead of time and allow for open question and answer periods after each session.

- Lectures: As the name implies, these events are well suited to college or university auditoriums that have theater style seating. The speaker should have a table, podium, water and candy at the dais, and be provided audio/video equipment as requested. Though not much typically needs to be done in the way of décor for a lecture or lecture series, the speaker may want to provide samples or visual aids on the stage or in the lobby.
- Symposiums: As with forums, symposiums involve attendees as presenters. Unlike forums, these presenters are on the speaker agenda and have prepared and lengthy presentations. Theaters are great venues for symposiums because of the seating capacity and scope of a stage setting. Each speaker can keep their materials at the ready behind the stage while they attend the other speakers' presentations. Theaters also offer

opportunity for large screen presentations with full audio allowing guests in the back or on the balcony to see and hear everything well.

- *Trainings*: Training events often require all participants to try out gear, perform practice drills, and participate in a variety of physical activities.
- *Workshops*: Like training programs, workshops often involve hands-on participation by attendees. If the workshop is business related, holding it in a company warehouse, where attendees can become immersed in the nature and products of the business might be the perfect setting for the participants. Vacant warehouses, often configured for hosting craft fairs and flea markets can work well for workshops as well, because they have spaces to set up various phases of the hands-on program and attendees can move from project to project as they finish each previous one.

Special Events

It could be argued that there is no such thing as an essential special event. People don't have to be entertained, enlightened, and introduced to new things... or do we? Some events, like fundraisers and trade shows for example, have a tangible impact: they create revenue streams for politicians and charities, and trade shows can be valuable marketing tools for products and services. From an attendee point of view, a fashion show or sporting event may seem only like entertainment. However, the former serves as the face of a multi-billion dollar industry and builds its sales, and the latter creates a multi-billion dollar industry and sizeable business service sectors to support it.

The following is a listing of some of the special events held regularly worldwide:

- *Art Exhibits*: Event planners often host art exhibits at existing galleries, rather than transport the artwork to another venue. The requirements and transportation of the artwork is expensive and requires insurance and special handling. However, artists periodically convene their works for special shows and exhibits. Mansions make good exhibit halls for such art exhibit events, as they tend to have large rooms and high ceilings that accommodate very large pieces and sizeable crowds. One of the key elements to remember when planning an art exhibit is security. The security requirements range from electronics to security personnel and should remain active during the exhibit and after hours as well.
- *Auctions*: Depending on what is being auctioned, an arena can be great location. At an arena, the items can be displayed on the floor for pre-auction viewing, and then projected on an overhead screen during the auction itself. If the auctioneer uses electronic “buzzers” to register bids, the attendees can sit anywhere in the arena; if bids are registered visually, only about one-third of the arena should be open for seating so the auctioneer team can see all bidders.
- *Book signings*: Book signings can be held almost anywhere there is enough room for the anticipated crowd, and a way to readily transport the books to the signing location.

- *Client/Employee Appreciation & Tributes*: When a company or individual wants to host a formal tribute, or thank you event, it is always a very special and heartfelt occasion. Country or golf clubs are good for such events because of their exclusivity. Such venues send the message “you mean a lot to us and this is a very special event.” Such tributes should have electronic or other visual displays of the relevant history of the individual, or individuals, being honored; generally an elegant and formal sit-down dinner is a cornerstone of the tribute event.
- *Community Programs*: A community program event should be held in a familiar and centralized location like “Main Street,” for the desired attendees. If there are structured activities such as lectures, presentations and/or food, it is wise to provide a facility like a city hall building or big tent to protect attendees from inclement weather. With some preplanning, most cities and towns will cordon off a number of blocks, barring automobile traffic, for such an event. Parking, permitting and insurance are major considerations when planning outdoor community programs and events.
- *Concerts*: Concert halls are the obvious locations for many musical concerts and events, but nothing pleases a crowd more than a concert in the park. Considerations need to be made as to protecting the musicians and their instruments from changes in the weather and staying clear of background noise such as street traffic. The sound system must also be more than adequate because of the open-air environment, and setting aside areas for people to dance is also advisable.

If the group or bands are well known then it may be necessary to provide security, dressing room trailers, and a VIP access corridor.

- *Expositions & Trade/Consumer Shows*: When planning a large-scale event where many exhibitors will be bringing in their displays and products from all over the world, it is highly recommended that event planners use established and seasoned expo facilities. These facilities know how to plan the space, provide adequate electricity and other resources to each booth area, and will have teams of decorators and other service providers they work with regularly. It is not recommended to hold a trade show or expo in an untried venue with no experienced staff while you are beginning your event-planning career.
- *Fairs & Festivals*: As mentioned previously, it is always recommended to use existing fairgrounds for fairs and festival events. As with expo centers, fairgrounds have a management team well versed in what aspects of each event are best suited to particular areas of the property, how to manage traffic flow, where to place portable sanitary facilities and how many are needed, and who all the local suppliers of essential goods and services are. Fairgrounds are a one-stop shop for indoor/outdoor festivals and other events.
- *Fashion shows*: The location of a fashion show event should be any place that has enough space for models, apparel, dressers, and hair and makeup backstage, and room for an ample runway and seating. Although these shows are sometimes held at theaters and utilize the

stage, this is not ideal as having a runway through the audience gives all attendees equal visual access to the apparel displayed. Fashion show venues should also have an area where attendees, designers and models can have a meet and greet after the show, and socialize over food and beverage.

- *Fundraisers*: Museums can be excellent venues for fundraisers of all kinds because they make people feel wise and grand, a mood combination that fosters generosity. When using a museum space, always provide ample security for existing exhibits, and plan traffic flow through various “giving” rooms; for example, you may want to have wine in the silent auction room, cocktails in the cash donations area, etc. That way guests will move from opportunity to opportunity while pursuing food and beverage varieties.
- *Historic Reenactments*: These events typically require a great deal of space, and many attendees have made a significant investment in their accouterments, so access to secure storage may be required. Private land or public land with bar-like facilities and a generous parking area well away from the action is ideal. States and counties have varying requirements for large-scale get-togethers like historical reenactments, so organizers need to make sure that all permits, zoning, sanitary and safety regulations are obtained and adhered to.
- *Political Rallies*: Nothing puts a group into a patriotic mood more than an historic building steeped in political history. Political rallies are known for generating unexpected results, so planners of them need to be

prepared to accommodate an unexpectedly large audience outside the venue as well as inside, and security is essential. When hosting a rally in a historic venue, plan ahead to add speakers and video screens outside in case of an overflow, and obtain permission to cordon off an area around the venue for safety and traffic flow.

- Road Shows: Road shows are events that pick up, pack up, move from destination to destination, unpack, and then do it all over again. They might be business road shows where staffs meet with potential investors, band or theater troupe performances, car shows or events like the Antiques Road Show that invites folks to bring possessions for valuation. In many of these cases a massive parking lot is ideal. The perimeter of the lot can be used for parking while the interior is set with a tent, and/or stage, areas for VIP accommodation, food and beverage locales, etc. Because parking lots are a clean slate, the design of the road show can readily be plugged into each venue without much in the way of reconfiguration.
- Sporting Events: The vast majority of sporting events require a certain type of “playing field” like racetracks and arenas. As with expos and trade shows, sporting event organizers should rely heavily on the skills and expertise of venue staff for event planning; these people know how to manage traffic, crowd control, ticketing, audio video, food and beverage, and much more. If the event is less environmentally restricted, a hunt for example, it is wise to consult with regional hunting

clubs and game authorities on matters of permits, location and best safety practices.

Social Events

Every bride will tell you she, at one time or another during the planning of her wedding, suffered from extreme sticker shock. It is amazing—and sometimes alarming—how much money people will spend to gather with their friends and family for a celebratory event, ceremony or party. Because social events are often emotional, people are willing to invest in the great emotional milestones of their lives. Furthermore, the sky is the limit when theming a personal event. Here are a few styling ideas for and motivations behind social events:

- *Anniversaries*: Anniversary get-togethers lend themselves well to fairly intimate gatherings of family and closest friends. A day at a winery where attendees can taste wines, wander the vineyards, mingle in small groups and enjoy the celebration over a sit-down meal makes for a very memorable celebration. Many vineyards have or are affiliated with resort hotels making it possible for the anniversary to also serve as a family reunion.
- *Ceremonies*: Churches and other religious facilities are obvious locales for ceremonies that bind people together. Many also have function halls and extensive property for outdoor ceremonies and receptions. If spirituality or issues of legality are not necessarily elements of ceremonial events, they can be performed anywhere by anyone. Parking, permitting, flow of traffic, sanitary requirements, power and other utilities,

food and beverage and weather change are each necessary to plan well-run ceremonies.

- *Cocktail Reception*: Yachting and cocktails have gone hand-in-hand for centuries and nobody throws a better cocktail reception than a high-end yacht club. Most clubs require that a member book events, so this may pose an obstacle for the event planner. If a yacht club is not available, any venue that evokes a mood suitable for the purpose of the reception will work well. When hosting cocktail parties know and follow the rules that prevent attendees from over-imbibing and make sure your permit to serve is in place by the bar service or venue.
- *Galas*: By definition, a gala is a lavish event: big, dramatically themed, and expensive. Galas typically include food, beverage and dancing. Great venues for galas are restaurants with separate bars, dining rooms, and dance floors. Because the food and beverage is already on site, the gala event planner can focus on décor and music, the menu and even designing signature drinks that fit the theme. These restaurants also feature exceptional staff and atmosphere.
- *Reunions*: When old friends or family get together for a reunion, it's usually good to make it last for a few days so everyone has the chance to splinter off and get to know each other again. Cruise ships are ideal for reunions because they feature different lengths for cruises ranging from two-day to many week cruises. The cost of a cruise can often be all-inclusive to include items such as: food, beverage, accommodation,

entertainment, recreation, etc. Reunions aren't so much about keeping the entire group together for structured activities as they are about creating a place where such activities can but don't have to occur.

- Showers: Typically for brides and expectant mothers, showers offer an opportunity for people whose lives are about to change to enjoy their family and friends while being gifted.
- Weddings: Most brides and grooms have a large percentage of their wedding photographs taken outside, and flowers are play a major role in ceremony and reception décor. Thus, botanical gardens are idea for weddings because they come pre-decorated with living plants and flowers, and almost always have an atriums or conservatories that are perfect for the ceremony and allow for the feeling of an outdoor wedding while protecting attendees from inclement weather.

These are only a few of the many different types of events that seek the services of an event planner. These examples barely scratch the surface of event variety and diversity. It is important to remember to listen to your client's needs, and then use your imagination to choose an event type and style that will surpass expectations and create indelible memories.