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Event Planning

Plan, promote and party:

A beginner's guide to planning and promoting internal company events.

Season after season, writers for NBC's *The Office* lampooned the Party Planning Committee with impossible requests from boss Michael Scott, rival unsanctioned parties and questionable party themes. In the words of the show's office administrator, Pam Halpert, "At its worst, it was a toxic, political club used to make others feel miserable and left out. At its best, it planned parties."

Maybe the laughs over the Party Planning Committee skits were easy because so many of us cubicle dwellers have our own experience with both interoffice drama and poorly executed office events. Internal company gatherings—from company-wide training and retreats to employee appreciation and holiday parties—are a necessary part of any business or organization, but they aren't always a success. Well-planned events serve to educate, promote the company, build camaraderie and reward employees for a job well done. Poorly planned events are costly in terms of time, money and morale.¹

No matter the size of the business or the reason for the event, planning an internal event is a challenging and time-consuming task. This Blue Paper™ is a beginner's guide to planning and promoting internal company events, outlining steps from forming a (hopefully nontoxic!) event team, and completing an evaluation. Are you ready to party? Then get ready to plan!

Step 1: Form your event team

Regardless of an event's size, designating the right person or team to plan an event is the first step to success. Event coordinators develop and implement the entire plan, from start to finish. Duties may include, but are not limited to:

- Establishing the event's goals, budget and timeline
- Envisioning an event design or theme
- Researching and selecting an event location and/or vendors, including food, décor, speakers, entertainment and activities
- Planning transportation to and from the event for attendees and/or speakers and special guests
- Arranging accommodations for attendees and/or speakers
- Event promotion



¹ Goodman, Michelle. "Company Morale Events Gone Bad." ABC News. ABC News Internet Ventures, 04 Feb. 2010. Web. 09 Feb. 2012. <http://abcnews.go.com/Business/company-morale-events-bad/story?id=9740130>.

- Coordinating the activities of event personnel
- Recruiting staff volunteers to work the event
- Supervising staff at the site before, during and after the event
- Conducting a post-event evaluation

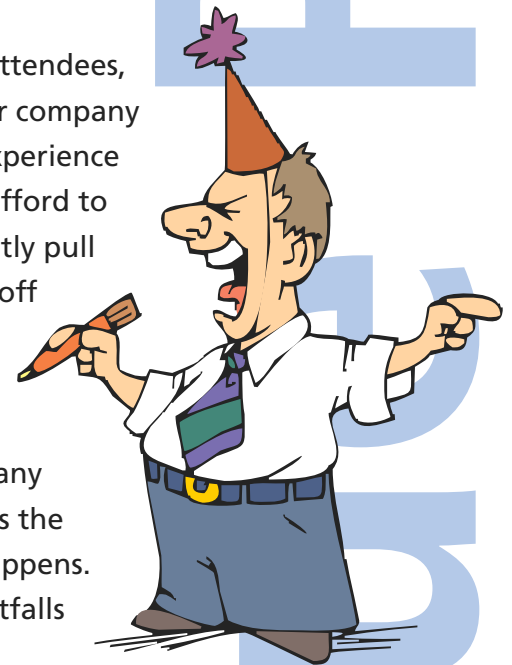
Begin by assessing whether or not your event would be best planned by an individual or a group. The larger or more complicated the event, the more likely a committee will be needed to complete the many required tasks. Even small events, especially those to which employees have a high emotional attachment, such as retirement celebrations, may benefit from a team approach, lest employees begin to feel that such events reflect only one person's preferences.

Rather than asking for volunteers, consider putting together an event planning committee the same way you would form a team for any other strategic task. Look for employees with the skills and experience that your event requires: a big thinker, a task master, a contract negotiator, a techie geek, a PR specialist, a print and/or Web designer, a bean counter, a foodie, a "life of the party" guy or gal, etc. Pulling employees from different areas of the company will help to expand the buy-in of different employee groups. Committee or no committee, internal events require a group effort. While one person may head up the planning, he or she will require help from within to coordinate the logistics, schedule meeting space, determine speakers, select entertainment and promote the event.

And as the saying goes, time is money. If your event will involve many attendees, multiple sessions, numerous vendors and travel considerations, and your company does not have at least one person on staff whose job description and experience includes meeting planning, consider how much time internal staff can afford to devote to planning. Is the event so large that planning would significantly pull them off their regular duties, or so important that it should be handed off to a professional meeting planner or event planning company?

Short of hiring a planner to manage the entire event, a new—and somewhat controversial—option is the "day-of" planner. When a company hires a day-of planner, the company's internal planning committee plans the event, and the professional planner manages the event on the day it happens. This can be a budget-friendly option, but it is also one with potential pitfalls in cases of gaps in communications and poor upfront planning that no professional, regardless of skill level, could solve at the last minute (which is why some professional event planners refuse to provide this service).

If you decide to hire a professional, consider planners who are active members of their industry trade organizations, such as International Special Events Society and



Meeting Planners International, and have earned professional certifications such as Certified Special Events Professional (CSEP) and Certified Meeting Professional (CMP).

Step 2: Set event goals

Even if you hire a professional planner, your company is responsible for setting well-defined event goals and a budget. Most internal events fall into one or more of these four categories:

1. Celebrations, such as birthdays, holidays, project-wrap parties and employee appreciation events
2. Education, such as internal retreats, company-wide training sessions, team building events and project kick-offs
3. Promotions, such as product launches, internal fairs, rebranding efforts and conventions
4. Commemorations, such as anniversaries, retirements and award ceremonies



Whatever category your event falls into, don't assume that the event activity itself is the only goal—or even the most obvious one. For example, the goals of a team recreational event are different from a team building event, even though both events may involve a physical activity. Ask yourself: What do you expect to accomplish with the event? What will attendees take away? How will the company benefit? How do you plan to extend the good will, learning, interoffice discussions or energy when the event is over?

Think about it: Do you want your event to build community or foster a particular internal culture? Create awareness of a new business initiative, program or product? Launch a rebranding effort?

As you set goals, think about the last step in event planning: post-event evaluation. How will you define a successful event? Number of attendees? Staying within the budget? A re-energized workforce? Increased sales? Improved collaboration?

Successful events have well-defined goals that help to guide the planning and marketing process. As Tara Back, president of Jack Morton Worldwide®, New York, says, "Don't just think of [an event] as a one-off moment in time—think of it as an ongoing brand experience."²

² "Event Innovators 2011: 25 Tips on Leadership, Design, Clients, and More." BizBash. BizBash Media Inc., 11 May 2011. Web. 09 Feb. 2012. http://www.bizbash.com/event_innovators_2011_25_tips_on_leadership_design_clients_and_more/toronto/story/20587.

Step 3: Know your audience

Going into the planning process with a clear picture of who your audience is and what matters to them will help you to achieve your event goals—regardless of whether or not attendance is mandatory or optional. (Most employees know the non-mandatory events are really mandatory, especially if they value their future with the company.)

Consider the workplace culture of your attendees. If raises and bonuses have been few and far between due to a struggling economy, an over-the-top bash may strike employees as a poor use of company funds. If you are planning an employee appreciation event, would the attendees enjoy a formal, four-course dinner at a high-end hotel, or is a company barbeque with a cook-off contest more to their taste? If your goal is education, what tools are most effective in helping your employees learn and retain knowledge?

Richard Aaron, president of BizBash® Media, says that while everything used to be about Baby Boomers, today's event planners must consider the needs and desires of everyone from Traditionalists to Millennials. "You need better technology to keep the young people involved, and remember people cannot sit too long—everyone is ADD today. Telephones are the next big thing—it's mobile marketing that is changing the landscape. Marketing by I.M.ing, welcoming everyone, sending schedules, allowing your attendees to receive updates during the show, sending speaker bios, broadcasting notices about what's happening on the floor ... it will become the standard."³

The size and profile of your audience will affect all aspects of planning—venue, activities, food, technology—and it will especially influence the next step: the budget. You'll never please everyone, but keeping your audience in mind as you make decisions throughout the planning process will result in a meaningful event for a majority of stakeholders.

Step 4: Budget, budget, budget

Here's where the real work begins. You may already have an overall dollar amount allocated to the event. Balancing that number with your event goals will help you determine where the money is best spent: venue, food, entertainment, speaker and so on.

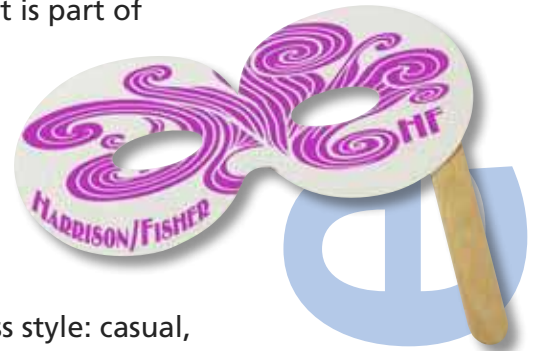


³ Aaron, Richard. "Breakthrough Concepts Changing Meetings and Events." *HSMIA's Affordable Meetings® Sourcebook for Meeting Planners 2010*. McLean, Va.: Hospitality Sales and Marketing Association International, 2010. 22. Print.

If you have a particular amount of money available and know the approximate number of attendees, determine your per-person budget. That number can give you a better picture of what's possible and what's out of the question. Anne Thornley-Brown, M.B.A., of Executive Oasis, a Toronto, Canada-based consulting firm that organizes and facilitates executive retreats and team building simulations, describes a call from a potential client who desired to book a team building event for 60 employees, but lacked clear goals, expected to be able to schedule the event two weeks out, and believed the event could be accomplished in two hours. The real kicker, however, was the caller's total budget: \$25 per employee. Thornley-Brown let the caller down gently, suggesting some recreational facilities and pizza.⁴

Whether or not you are beginning with a firm number, start with some research. Down the road, you'll want to solicit bids from multiple vendors, but for now, ballpark figures for venue costs, catering rates, speaker fees and entertainment will help you to envision the best event you can afford. Skye Griffith of Skyline Talent & Events begins the budgeting process with her clients by analyzing these elements⁵:

1. **Date**—The day of the week and time selected will often impact charges.
2. **Number of projected attendees**—The number of guests is a major cost factor.
3. **Venue requirements**— Consider site location, room size, lighting, audio/visual requirements, etc.
4. **Event goal or purpose**— For businesses, define if the event is part of the marketing strategy, such as a product launch or a building dedication, an awards dinner, board meeting or a social get-together for clients or employees.
5. **Theme**— This is often a consideration for both private social events and corporate functions to add fun and excitement, such as Western, New Orleans, Las Vegas, etc.
6. **Style**— The tone or mood will be determined by a business style: casual, formal or theme.
7. **Menu**— Determine the type of food service—a plated dinner, buffet or cocktails and hors d'oeuvres or some sort of combination.
8. **Media requirements**—A business program may require screens, projection equipment, microphones, etc.
9. **Entertainment**— This can be a major element, for ambience or geared to a theme.



⁴ Thornley-Brown, Ann. "Team Building: Back to a Bottom Line Focus." *Team Building Blog—Corporate Team Building*. Executive Oasis International. Web. 09 Feb. 2012. <http://corporateteambuilding.wordpress.com/>.

⁵ Griffith, Skye. "How to Budget for an Event." *National Meetings and Events*. Meetings + Events Media Group, 08 Jan. 2010. Web. 09 Feb. 2012. <http://meetingsmags.com/article/how-budget-event>.

10. **Design elements**— Determine your most important event design elements, which may be the venue, theme, food, décor, entertainment or other.
11. **Details**— This could include invitations, gifts, premiums, centerpieces, flowers, etc.
12. **Logistics and services**— This could include valet parking, coat check, security, production services, other.

Additional elements to consider, depending on your specific event, may include speaker fees, transportation costs and overnight accommodations for employees or speakers, and printing and other promotional charges. Be sure to include a budget contingency for unexpected expenses—good planning can help to avoid dipping into this fund, but seasoned event planners know to expect the unexpected.

As you nail down your budget later in the process, solicit competitive bids from vendors, but be sure to balance a low bid against reputation, skills and experience. Most important: Get everything in writing, read the fine print and make sure you understand the fine print.

Step 5: Choose a theme

Corporate event themes have gotten a (sometimes deserved) bad rap.⁶ Who hasn't endured a cheesy party theme and cheap décor at least once in their career? Still, Richard Aaron of BizBash says that themes are critical to any event. "Themes unify the team, communicate stronger vision, drive the 'buy-in' process, create excitement and define collateral development."⁷

The key is to choose well, with your event goals, company brand and workplace culture in mind. A rebranding effort or product launch will have an obvious theme, and you won't want to detract from that theme with unrelated décor. For a training session or strategic meeting, a fun theme may help to lighten the mood. If you are choosing a party theme for an employee celebration, an Internet search will help you to discover the latest trends and fresh interpretations.

And although it may or may not relate directly to your theme, "green"—as in environmentally friendly—is a trend in the event world that shows no signs of going away. If this is a value to your company, ask your vendors for suggestions to implement this value throughout your event, and ensure that your audience is aware of your efforts.



⁶ "Theme Décor Making a Comeback, Special Event Designers Say." *Special Events Magazine*. Penton Media Inc., 18 June 2009. Web. 09 Feb. 2012.

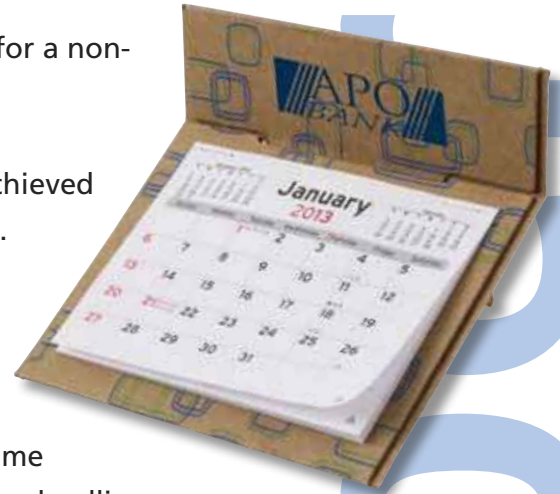
<http://specialevents.com/themes/theme-decor-makes-comeback-special-event-designers-say-0618/>

⁷ Aaron 23.

Step 6: Save the date

The right date and time will help to encourage a good turnout for a non-mandatory event and lessen any grumbling from attendees of a mandatory event. Here are some guidelines:

- Consider whether the event goals would be better achieved during the workday or outside of normal work hours. Remember that childcare needs and other personal obligations may discourage attendance at an off-hours event.
- Avoid important religious and cultural celebrations and busy holiday seasons. Ensure that the date and time you chose does not conflict with other major company deadlines, initiatives or the end of the financial year.
- Set a date with the planning timeline in mind (see Step 7). Can you realistically plan the event in three months? Six months? Do you need a full year or more? A short lead time can doom your event from the start: speakers, vendors and venues may already be booked; potential attendees may have other plans; a key planning task may slip through the cracks.
- If your event will involve a particular speaker, the date will depend on that person's availability. Most speakers bureaus recommend booking a minimum of 6 to 12 months in advance.
- Consider the budget. Some venues will be less expensive on certain days of the week. An off-hours event that includes spouses, families and guests will require a larger venue and catering budget than a workday event for employees only.
- Schedule annual events near the same date every year so that attendees anticipate the event and avoid making other plans.
- If the event is outside of normal work hours, consult your HR department if there is a chance that the date and time will raise an issue in regard to hourly employees and overtime pay.
- Double and triple check the date and time with each vendor.



Step 7: Develop an action plan

Your event planning committee is in place, you've identified your goals and your audience, the budget is taking shape and the theme and date are set. Now it's time to grab a calendar, develop a timeline and begin assigning tasks.

As with any deadline-driven project, a timeline is best developed working backward, setting milestones for when each task needs to be complete before the event. E-tools for meeting management and event planning range from very inexpensive smartphone and notebook apps with customizable checklists to more

expensive event management software and online event management services and website creation. Taking the time to find the right planning tool for your event will help streamline the process as you move from a year or more out to the day of the event.

As you develop your timeline and checklist, think about how your event will flow from the moment attendees arrive (or before, if travel is required) through the end of the event. When attendees arrive, what will they require immediately? Valet services? Training materials? Gift bags? A beverage? Thinking through needs at every moment of the agenda will help you to develop your event's unique checklist. Here are some general tasks, adapted from a master checklist from the experts at Keynote Resource speakers bureau:⁸



6-18 months out

- Develop an event agenda and attendee list.
- Set the date and time, and get it on your company's master calendar as soon as possible.
- Approve a preliminary budget.
- Determine event site requirements: food and beverage, audio-visual needs, transportation, décor, photography and recording, registration and welcome, overnight accommodations, training materials, parking, restroom facilities.
- Develop a promotional strategy and identify logo and branding needs and opportunities.
- Determine preliminary printing requirements and printer deadlines.
- Solicit bids from venues and vendors and conduct site visits. Select and confirm vendors.
- Book outside speakers and entertainment, and confirm speakers from within your company.
- Consider how you will collect feedback, and develop an event evaluation strategy.
- Set meeting and milestone dates for the planning committee.

4-6 months out

- Select gifts for honorees and attendees. Plan for door prizes or other event incentives.
- Identify ADA requirements and security and risk management protocol. Check with your insurer for any coverage issues and determine if you need special event insurance.

⁸ "Corporate Event Planning Steps, Tips and Checklist." KeynoteResource.com. Keynote Resource Inc. Web. 09 Feb. 2012. <http://www.keynoteresource.com/bookspeaker.html>.

- Review event site hardware, software and connectivity requirements.
- Finalize the budget.
- If your event is outdoors, prepare back-up plans in case of rain, wind or excessive heat or cold.

2-4 months out

- Send invitations and follow-up with reminders.
- Finalize food and beverage selections.
- Order flowers.
- Confirm date, time and services with all vendors.
- Arrange for transportation of event supplies from your company to the event site, as well as return shipment as necessary.
- Ensure that signage and printing needs are on schedule with printer deadlines.
- Review onsite staff needs and solicit volunteers.

Week of event

- Confirm final attendance number with vendors.
- Confirm shipping schedule of inventory, equipment and supplies to event site.
- Schedule a final walk-through.
- Review VIP arrangements.
- Schedule a meeting for post-event evaluation.

Day of event

- Receive and inventory all shipments, equipment and supplies and confirm return shipment.
- Set up event or meeting spaces.
- Conduct instructional briefings for volunteer staff.
- Walk through the venue and check that all requirements have been met.
- Be prepared for last minute challenges!

Immediately after event

- Inventory and pack all materials.
- Thank event staff, volunteers and vendors.
- Gather evaluations from attendees and volunteers.

Step 8: Get the word out

An employee's experience with an internal company event begins the first moment he or she hears about it, which may happen via a companywide announcement, a save-the-date memo or a formal invitation. Even if attendance



is mandatory, strategic promotion communicates the value of the event and raises anticipation and excitement among employees. Approach event promotion as you would any marketing campaign, with your timeline, defined audience and goals in mind.

Use an integrated marketing communications approach. Include intra-office mailings, invitations sent to employees' homes, emails, newsletters, your company's intranet or website, internal social media channels and video messages. Be sure to carry the event theme and goals through all marketing efforts.

Talk about it. Mention the event in staff meetings and place flyers or table tents in common areas or break rooms to serve as conversation starters.

Be clear about expectations. Let employees know if the event is mandatory, if it's invitation only, if employees are allowed to bring guests and so on.

Be persistent. Hit your audience more than once with promotional messages. Send official invitations two months in advance and follow up with reminders and a "last chance" RSVP prompt based on event deadlines (when the caterer needs a final count, etc.).

Marketing agency veteran Drew McLellan reminds his clients that an audience needs to hear a message 8-13 times before they notice you are talking to them.⁹ He brainstormed the following campaign for a client who wanted to increase attendance at optional internal company training events:

- **Tease them:** Don't give them all the information at once. Give them the bare bones (date, time, place, etc.) but keep some of the details for the next communication.
- **Catch it on camera:** Run around the office with a flip camera and record some people who know about the event. Ask them why they're excited or looking forward to it. Post it on YouTubeSM, your corporate intranet or someplace else that employees will go see it.
- **Drip marketing:** Remember ... you want your marketing to [be a drip, not a downpour](#). So why not get six to eight little tidbits of the content (think of it [like a snack](#) ... which is how we like to consume information) and rather than send out one huge email, once a week send a tip tied to the content of the training.
- **Let them eavesdrop:** Whip up a quick 5-minute podcast with the presenter. Let the potential audience hear the presenter's enthusiasm and energy around the topic.



⁹ McLellan, Drew. "5 Ways to Promote Internal Training and Events." *Drew's Marketing Minute*. *Drew's Marketing Minute*, 10 Nov. 2009. Web. 09 Feb. 2012.
<http://www.drewsmarketingminute.com/2009/11/mixed-up-marketing-works-best.html>.

- **Make it personal:** Draft a quick 15-30 second script and ask every supervisor to personalize it and then leave a voice mail for their direct reports inviting them to the event.

McLellan concludes: "What have we done? We've hit them with the written word, teased them with tasty snacks of content, let their peers and supervisor weigh in, [used multi-media](#) and made it personal. All for the cost of ... \$0."¹⁰



Step 9: Evaluate—Was it worth it?

If you've gotten to this point in your event, you may feel like kicking off your shoes, sitting back and noshing a leftover canapé. Well, you deserve it, so go ahead! But the job is not quite over. Evaluating the event and the planning process is one of the most valuable steps, helping you to set budgets and make decisions regarding future events.

Donna Kastner, director of education and engagement for Velvet Chainsaw ConsultingSM, recommends a short debrief immediately after the event. "For every hour that goes by after the big conference closes, a bit of insight floats away," she writes. "Observations and experiences get fuzzy, compromising your ability to act on those pearls of wisdom. Gather the team onsite before you leave and first, thank them for their hard work and support. Then, ask each member to offer their thoughts about (1) What went well? (2) What could go better next time? and (3) What ideas did you jot down for future discussion? Wear your facilitator hat and don't comment on the merits of each item. Simply thank that person for their contribution. Have someone take notes on everything that was said, and let everyone know you will revisit these items in greater detail at a future debrief meeting."¹¹

It may take several weeks to gather final financial data and event survey results, but don't let too much time pass before you meet for an in-depth review of the event with the planning committee and other key stakeholders. At the meeting, be sure to review not just the event, but the entire planning process:

- **Refer to your original goals.** Did the event meet or exceed those goals? If the goals included long-range changes, such as increased sales or better collaboration between divisions, you may have to come back three months, six months or a year or more out to evaluate results.
- **Review event evaluations.** If your event included an attendee

¹⁰ Ibid.

¹¹ Kastner, Donna. "4 Tips for Planning an Effective Post-Conference DeBrief." *Event Planning: a blog by Cvent*. Cvent, 06 May 2010. Web. 09 Feb. 2012. <http://blog.cvent.com/blog/meeting-planning-innovation/4-tips-to-planning-an-effective-post-conference-debrief>.

evaluation, compile the results and see if patterns emerge. Was there one aspect of the event that everyone loved or hated? Any logistical problems that attendees noticed? Do attendees believe the event was valuable and a good use of their time?

- **Analyze the budget.** Did the event come in at or under budget? If you went over budget, what was the reason for the unexpected costs? How can that be avoided in the future?
- **Review the vendors.** How did each vendor perform? How well were last minute changes handled? Did the vendors help you problem-solve, or did they stand in the way of what you needed?
- **Review the planning process.** What was done well, and what could have been done differently? Did you have enough time to plan the event, or would more lead time have helped? Were there any gaps in expertise that could be filled next time?

“You should emerge from this session with clear action steps for each participant, so you can incorporate best ideas in your next meeting planning cycle,” Kastner says.¹²

By reviewing the event planning process and outcome from start to finish, you’ll be able to glean information that will allow your next event to be even bigger and more successful. There’s no doubt that internal company event planning is a lot of work, but the guidelines in this Blue Paper will help you pull off the event with the least amount of stress, letting you enjoy the party. Now, who made off with those leftover canapés?



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¹² Ibid.