



8 Simple Steps to **Event Planning**



We get it. Planning an event, especially a big one, can seem like a daunting task.

There are a million things to do and, if you're like most small-staff associations, very few people to help.

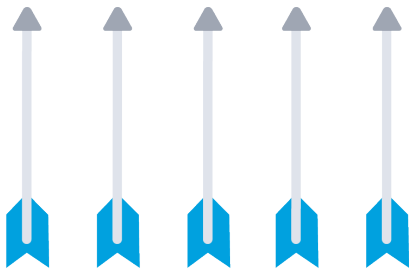
But fear not! We've broken down the event planning process into eight simple steps for overall success.

Ready? Let's get started!

1

Establish a goal

The very first step in planning an event is to establish a goal. What's the purpose of your event? Is it to allow members to network with a larger group? Or perhaps to establish bonds within a smaller group? Whatever it is, make sure to define it upfront so that all other planning follows suit.



2

Assemble a team

You know what they say, teamwork makes the dream work, and that's particularly true of small-staff event planning. In order for an event to be successful, you need to have a strong team ready to divide and conquer. That being said, prepare to assemble:

- **A committee:**
Your committee should consist of people dedicated to planning your event. Depending on the size of your event, you may even want to establish subcommittees to further divide roles and responsibilities.
- **Volunteers:**
For small-staff associations, volunteers are the key to success. If you need extra hands, try engaging your membership or reaching out to other organizations for assistance.
- **Speakers:**
Now this one's optional, but if you do need speakers for your event, now is the time to check their availability. Remember, speakers can sometimes be just as valuable as volunteers.

3

Determine a budget

When you're putting together a budget, there are several factors to consider. For example:

- **Venue:**
This goes beyond just a space. It includes insurance, permits, staff, etc. — basically anything that's needed to utilize a certain location.
- **Food and Drinks:**
This includes snacks, meals, catering assistance, and so on.
- **Entertainment:**
This goes beyond just a speaker or a local band. Think equipment rentals, microphones, A/V hookups, etc.
- **Speakers and Presenters:**
Depending on the event, you may need to factor in travel fees and hotel accommodations for speakers and presenters.
- **Publicity and Promotions:**
Some promo items, such as signage and printed programs, cost extra. Be mindful of that when preparing your budget.

4

Select a venue, time/date, and time frame

When it comes to selecting a venue, you'll want to pick a location that's local, convenient, and within your budget. Consider locations you've used before as well as locations used by others. If you're at a total loss for ideas, try asking your board or close members for suggestions.

Now let's talk time. In general, it's best to give yourself about four to six months of planning time. This, of course, varies by event, but give yourself a little wiggle room in case anything goes astray. You'll want to be mindful of religious holidays as well when selecting a date for your event.

5

Determine a registration process



Establishing a thorough registration process is the key to event planning success. After all, what's the point of having an event if no one's going to come? That being said, you want your registration process to be as seamless and all-encompassing as possible. To make that happen, consider the following components:

- **Registration Forms:**
Do you have registration forms set up and ready to go? Do you have links to them on your website?
- **Cutoff Dates and Pricing Model:**
Does your pricing change based on cutoff dates? Can your event registration software automatically adjust registration?
- **Multi-registrant Forms:**
Will users need to register more than one person? If so, does your website support multi-registrant forms?

- **Breakout Session Sign-ups:**
Are you holding breakout sessions? Can users register for those when they sign up and pay?
- **Notification Emails:**
Do you have automatic notification emails configured to remind registrants as the event get closer?

If your current system lacks any of these components, it might be time to consider an association management system. An AMS is a technology solution that helps associations plan and promote events, communicate with constituents, collect fees and more. It can truly be a lifesaver when it comes to planning events.

6

Promote, promote, promote

Even with the best speaker or entertainment line-up, you still need publicity to get people in the door. Consider the following promotional techniques:

- **Featuring the event in your organization’s newsletter**
- **Sending out email blasts to your membership database**
- **Reviewing past event attendance reports and re-inviting all of those people (even if they’re not members)**
- **Posting the event on your website’s event calendar**
- **Announcing the event on your social communities and forums**
- **Promoting the event on social media**

Again, this is where an AMS can really come in handy. An AMS can help you with all of these techniques, so why not take advantage?



7

Do a test run

This step is optional, but it could make the difference between a successful event and a flop. Try conducting a test run at your arranged venue, keeping a close eye on things like traffic, parking, walkability and entrances. If you happen to notice any weird quirks, email your registrants with a little heads up.

While you’re at it, be sure to test out any A/V equipment that you’re planning to use. The last thing you need is a technical tragedy during your big presentation.

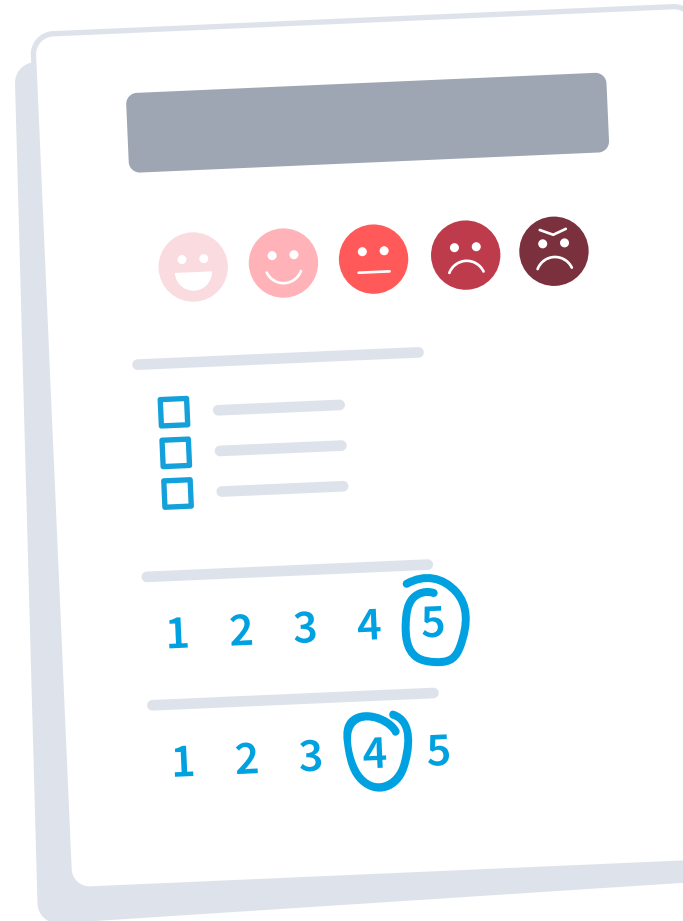
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Collect feedback

After all that hard work, you want to know how the event went, right? Some of it you can probably judge yourself. Was attendance what you expected? Did people seem to be enjoying themselves? Was the food good and delivered on time? Consider your own thoughts, but get your attendees' feedback as well.

Again, this is where an AMS can really come in handy. An AMS can help you with all of these techniques, so why not take advantage?

- **Placing comment cards on tables at your event**
- **Posting a survey on your organization's website**
- **Emailing post-event surveys directly to attendees**
- **Reviewing analytics, such as which breakout sessions were most popular (This is extremely easy to do with the help of an AMS.)**



If you don't have an AMS, now's the time to look into getting one — especially if you're trying to engage members through events!

Want to know more about what an AMS actually does?

Check out our free guide, **What Is an AMS?** here!



Click here to check it out!

More about MemberClicks

MemberClicks offers all the tools that membership organizations need to make the most of the web. From online databases and event registrations to custom-designed websites and member communities, our products are tailor-made for small-staff organizations.

For more information:

- ▶ **Visit us at www.memberclicks.com**
- ▶ **or call us at 800.914.2441**

