



Event Planning for **Non-Event Professionals**

And how to get started with the big picture



At many associations, chambers of commerce, and other member-based organizations, event planning duties tend to fall on people who are *not* professionally trained event planners.

That's a tough spot to be in! Event planning is all logistics and details. Not only is it a LOT to learn on the job, but learning it all *while* you're trying to actually execute it? *And* working on your other job responsibilities? It's overwhelming, to say the least.

But don't worry, we're here to help. In this guide, you'll find guidance on the big event picture: aka, the imperative (but often overlooked) areas of event planning that will serve you well in the long run if you think about them now — plus some basics to jumpstart your planning process.

Let's dive in!

The basics

Like we said, many of the tips in this guide get into more advanced event planning thought processes and methods because they're the things that other planners *wish* they knew when they first started.

That said, if you're reading this in preparation of planning your first event (YAY!) you may need some guidance on a few basics first:

1 Venue selection

Be thorough in your research, but realistic with your choice. It can be tricky to find a venue that meets your needs *and* fits your budget. Make a list of MUST-HAVES and NICE-TO-HAVES, and focus on those musts as you search your city (or others) for potential options.

2 Date planning

Of course, the nature of the event could dictate its timing, but be sure to do a quick check to avoid potential conflicts, like other conferences in your industry, holidays, major community events, etc.

3 Food and beverage

First of all you need to decide *if* you'll be serving food and/or beverage at your event. And even then, before you can decide *what* you'll have, work with your venue to determine what they'll allow. If the event is open to the public, don't forget to look into any permits you may need!

4 On-site staff

You'll need more hands on deck than your planning team. Think about the event from start to finish and where you'll need extra help: checking attendees in, welcoming guests into sessions, managing the flow of traffic, hyping up the crowd, etc. Whatever it is, start assigning tasks or soliciting volunteers early!

▶ Looking for more event planning resources, from basic to advanced?

Head over to blog.memberclicks.com — we write about event management all the time, and have a few guides on the topic, too!

Set yourself up for success: Registration form and reporting

Planning a successful event takes a lot of forethought. You want to kick off any event planning process by thinking about your event from the top down, and setting up your online registration forms and reporting to help you with, well, just about everything else. How, exactly?

Think about what you'll want to know about your attendees before you build your registration form.

Gathering information from them early on, literally as they are registering, will help you understand who your attendees are and what they want to see at your event. (You can even plan future events armed with this info!)

This information could be as straightforward as needing to know their t-shirt size and any dietary restrictions — or, get specific and ask for more information like their role, career-level, areas of interest, etc. so you can group attendees for meaningful activities based on their similarities.

The way your registration form is set up can also make or break the quality of your event reporting.

As you go through the planning process, you'll find yourself constantly referring back to your attendee registration data to make informed decisions. But, your ability to do that greatly depends on not only what you're asking, but also *how* you're asking it.

Get the most accurate reporting by limiting available answers whenever possible: for example, asking registrants to choose from a list (multiple choice) will keep your data for that question in those specific categories (rather than leaving it open ended and having to try to categorize the answers yourself) so you can easily see trends among attendees.

▶ **Did you know?**

Using an online event registration platform that has powerful reporting capabilities can be a real game changer. Look for a system that can give quick stats on any field at a glance, and provide robust, customized reports that dig into specific needs.

Get friendly with finances

Now you may not have a ton of experience with the numbers, but it's important to have a firm grasp on your finances when planning an event. And there are a couple of things to think about right away:

Set a budget from the start so you have some guidelines as you start having to spend money.

There are a lot of moving pieces to budget for and you can overspend fast if you aren't paying attention. In fact, depending on the size of the event you might even break that budget down into categories (food and beverage, the venue, A/V, swag, etc.). Trying to lump it all into one amount could get *way* too complicated.

There are a couple ways to consider creating your budget: simply estimate the amount you'll need for everything, or, if you're paying for event production with the event's revenue, estimate what the revenue will be by multiplying what you're charging attendees by the number of attendees you expect. Either way, you'll want to be conservative with the estimate and give yourself plenty of wiggle room.

Speaking of what you're charging attendees, there's a lot to consider when it comes to registration fees, too!

In part yes for that budget, but also because the fee should reflect the value that attendees will be getting out of the event. This goes both ways: you don't want to overcharge and leave attendees feeling disgruntled when they don't get what they expect, but you also don't want to undercharge and give the impression that it's not worth their time.

If you aren't planning to charge for attending, that's ok! But you might consider using a credit card capture on your registration form anyway so you can charge a no-show fee to those who register but don't show up. It's a proven technique we've seen that helps reduce no show rates and recoup food and space expenses. (If you do this, though, be sure that policy is explicitly stated on the registration form.)

From there, it's all about monitoring your spending and registration revenue like a hawk, and adjusting your budget to reflect that activity.

Think from the attendee perspective

Or perhaps we should say audience perspective, because this should start before anyone even registers! You want people to have a seamless experience with your event and its brand from the moment they hear about it to the moment they leave. What do we mean, exactly?

Does the branding on your event website (or event info on your organization's website) match the branding of the event registration form? And does *that* match the branding that'll be on-site?

Thoughtful, intentional branding will help people feel more comfortable and confident in the accuracy of the information they're seeing as they move through the stages of discovering your event, learning more about it, and considering registration...*because it'll all look the same*. So simple, and yet you'd be surprised how often consistent branding is overlooked, even by professional event planners!

Consistent branding also elevates your event. It'll make everything look smooth and polished (even if YOU feel like you're scrambling). Need branding assets? Look to your team's marketing expert for help with the correct logos, brand colors, messaging tone, etc.

And when it comes to the on-site experience, create an attendee journey map.

It may seem silly, but taking the time to think about how they'll arrive at the venue, where they'll check-in, etc. will help you see where there's room to add more attendee value along the way. This could mean interactive "experiences" and photo opps, small (but refreshing) gestures, or even just signage that clarifies where they should be or what they should be doing.

At the end of the day, the most important part of planning your event is ensuring that it's worth your attendees' time (and money), and that their entire experience is smooth sailing.

Strengthen your promotion efforts

So you've got the basics covered, your online event registration form and reporting are good to go, you've created a budget, and the attendee experience is mapped to a T.

Now let's get some registrations! Promoting your event comes with many highs and lows — literally, because you'll have a day with tons of activity, and a few days with none. But don't be discouraged! Know that all event planners (professional or not) have been in your shoes. That said, we have a couple recommendations for strengthening your promotion efforts:

Having a website that's dedicated solely to your event makes a huge difference.

Partly, as we mentioned, because it gives your event more gravitas and the consistent branding will help decrease hesitancy to register. An event website that's separate from your association's or chamber's will also help you gauge and generate interest:

- A separate website means separate traffic and analytics, so you'll have a much easier time differentiating who's interested in the event from who's interested in the organization itself. You could even dig

deeper into that event website traffic to find specific segments within your event's audience to speak to.

- Separate websites also allow you to be more flexible and creative with how you promote the event. You can include all of the event-related content you want and really generate some hype. Plus, it's a whole lot easier to point all of your marketing efforts (whether it's over email, social media, your newsletter, etc.) to that one event website, rather than a page buried somewhere within your organization's site.

"We now have the freedom to easily create conference-specific branding and highlight major parts of our events on any and all parts of the website, without detracting from other important membership updates that might come up on our primary site."

Makenna, SBI Association Management

And don't be afraid to take advantage of tiered pricing levels and promo codes!

If you have some time between when you'll launch registration and the event date(s), consider using an early bird fee to get traction right from the start. Then, you can set the form to increase fees periodically as the event gets closer.

Pricing tiers allow you to promote a sense of urgency. Running discount promotions can accomplish the same thing! If you set up a promo code to only be valid for a period of time (or for a certain amount of uses) you can send it to your members over email, social media, etc. and see who bites with that extra, urgent incentive. Promo codes can also be used one-to-one to make members feel more special. (And, therefore, more inclined to attend.)

▶ **Did you know?**

Pricing tiers are a cinch to manage with an online event management solution, as long as it automatically changes pricing over at pre-set points.

Register for

\$199

LIMITED TIME OFFER

through October 31st!

Register for

\$249

LIMITED TIME OFFER

through November 30th!

Register for

\$299

LIMITED TIME OFFER

through January 31st!

Have an attendee communication plan

Once your audience starts signing up... woohoo! That's it, right? NOPE!

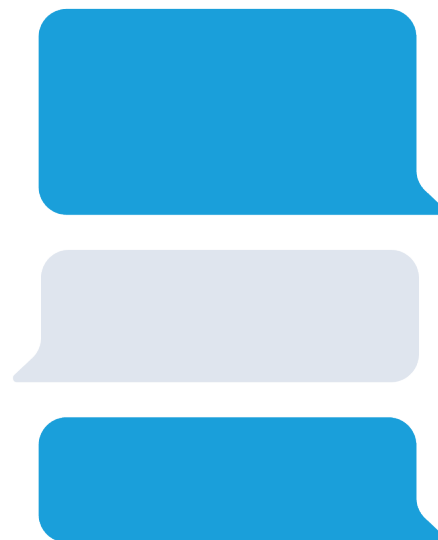
Yes they've registered, but *don't* go silent on your attendees. It's the opposite, in fact: at this point, they're your most important audience segment and you should continue strengthening that relationship so they follow through with attending, have a great time, and attend again! (Remember, their experience starts NOW.)

First, come up with a pre-event (but post-registration) communications plan.

Your goal is to keep the excitement alive while providing attendees with all the information they need. This could be accomplished through updates as you add more activities to the schedule, and FAQs as the event gets closer. (Expected weather, where to park, dress code, any last minute changes, etc.)

Another layer of information to consider: does your event involve signing up for anything? Do you have room capacities to account for? These are all things you'd want to communicate to attendees ahead of time, too — perhaps even as they're registering.

In fact, if your online event management system allows you to assign capacities to those parts of your event, all the better! That way the sign up for that item can automatically close when sold out. This will help you avoid overbooking, and potentially even drive more registrations by showing potential attendees how many (or how few) seats are left.

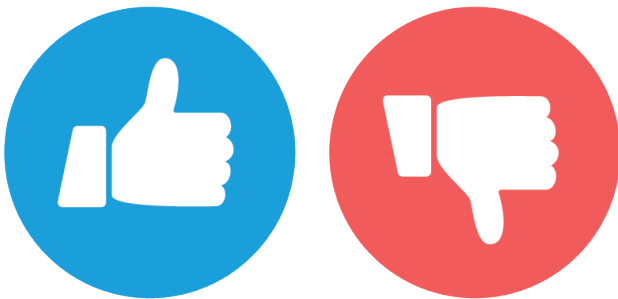


As far as post-event communication, focus on getting feedback.

But don't just collect it and forget it. You'll want to gather your team for an event debrief, read through that feedback while it's still fresh, and, most importantly, determine how you'll USE IT to improve the event in the future. And if anything stands out from an individual attendee, don't be afraid to reach out to them directly to talk more about it. (Remember, we're building loyalty here!)

One final thing to consider is how you'll continue nurturing those event attendees after they've given you their feedback. If this is an event that'll repeat (or you'll be planning something similar), keeping past attendees engaged and in the loop will make promotion even easier the next time around.

Once you have your communications plan down, take some time to write email templates and set them up in your online event management platform to either send automatically when attendees take certain actions (registration confirmation, invoices, etc.), or as blasts you can manually send to all or segments of attendees. Doing this preparation now will save you time *and* sanity in the future. (Who wants to worry about writing emails when there are logistics to be managed?)



Hopefully, these bigger picture event planning tips will help you set a solid foundation for managing the details and logistics moving forward.

And hey, if you're looking for some more event planning guidance, check out [Association Event Planning: The Complete Guide](#). Whether you're involved in planning your annual conference or are looking for ways to improve member events throughout the year, this guide is for you!

If you've got the planning down, but need help with the technology side of things, take a look at [MemberClicks](#). Whether you need a membership management system with event management capabilities, an entirely standalone event management solution, an event website, a conference app, or all of the above, we can help make your next event the best event. Visit memberclicks.com or call [1-800-507-3759](tel:1-800-507-3759) to learn more.



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 professional associations, trade associations, and chambers of all sizes.

For more information:

- ▶ Visit us at memberclicks.com
- ▶ Call us at [800.914.2441](tel:800.914.2441)



