



# EFFECTIVE EVENT PLANNING: A STEP-BY-STEP GUIDE

There is very little scope for improvisation when organising an event – so we've put together this event planning guide to help ensure that nothing is left to chance. Read on for the step-by-step route to success!

## STEP 1 – CLEARLY DEFINE THE GOALS FOR YOUR EVENT

What are you seeking to achieve through your event? Answering this question will help you assess your needs and select the options that will enable you to fulfil your goals. Whether you wish to bring your participants together to motivate them, thank them, train them for new products or to build team spirit, a wide range of different events and solutions is available to you.

- When defining your goals we advise you to take account of the audience you are targeting. Your approach will vary according to whether this audience is made up of your top clients, partners, suppliers or employees.
- Choose the speakers for your meeting according to your target audience. For an internal audience, call in someone from outside your company – preferably someone well-known. Conversely, for a meeting targeting your customers a speaker from within the company is often appropriate.
- If your meeting is taking place over several days and you are looking to make a real impact on your participants, we suggest that you offer them:
  - a themed evening event in an unusual venue or in an event facility personalised in your corporate colours;
  - a gala dinner and show to conclude the event and leave a lasting impression;
  - a team-building activity – sports, funny, or relaxing – as a bonding exercise or to create a shared group experience.

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## STEP 2 – DEFINE THE FORMAT AND THEME OF YOUR EVENT

**What's the most appropriate format to achieve the goals for your event? How many days should it last, and for how many people? What will its theme be, and its title?**

- If you decide to offer your guests a dinner, a team-building activity or any other event in conjunction with your meeting, be sure to take account of the size of your group, the average age of participants, the male-female mix and nationality.
- If your group includes participants of various nationalities, make sure that the language barrier does not hinder group cohesion. Offer simultaneous interpreting for meetings or, if the group is large enough, divide your participants into country-by-country groups with speakers who can talk to them in their own language.
- If your audience is mainly male, offer a sports-based team-building activity - an adventure trail or rally, for example. Female groups tend to prefer activities with the emphasis on fun and education – floral decoration workshops, cookery courses, spa activities, etc. Some activities suit both sexes – car rallies and treasure hunts, for example. Don't hesitate to ask your agency or event manager at the venue for advice.

## STEP 3 – CHOOSE THE RIGHT VENUE AND TIMING

**Your choice of venue is absolutely crucial. Key factors to take into account when selecting the venue to host your event are: venue capacity, a location that's easy to get to for all your participants, a varied and original offer tailored to your company's needs, and the availability of a single contact person to support you throughout the event.**

- Site visits are a vital step in the selection process. Our Practical info sheet No.1, «Carrying out a site recce», which you can download from our website, will help you gather all the information you need from your recce.
- When you choose the date of your event make sure that it does not clash with other major events happening at the same time – either nationally or within your sector. Also avoid staging your event during bank holiday weeks, school holidays and potentially also during major sporting events, in order to guarantee optimum attendance.
- Send a quotation request to your contact person at the venue. If the solutions they offer and the estimate are suitable, make a provisional booking as soon as you can.

## STEP 4 – CLEARLY DEFINE YOUR BUDGET

**This step involves estimating the costs of staging your event. Private hire of facilities (meeting venue, catering facilities, etc.), accommodation, choice of menus, delegates' travel, additional activities, technical services, performers, decoration, promotion: these are the main items to include in your budget. Don't forget to set aside around 10% of your total budget to provide for unforeseen expenses and last-minute requests.**

- Ensure that your contact's line manager at the venue is also involved at the negotiating stage. Ask them to supply a model contract along with terms and conditions relating to deposits, payment and cancellation.

- In order to obtain the most competitive price ask about the periods when prices are lowest. If you can hold your event during a less popular period this will help to keep costs down – and you can use these savings to upgrade other offerings such as catering, performers, technical facilities, floral decoration, or any other details that might make a big difference.
- If you are providing accommodation for your guests we suggest that you negotiate an upgraded offer for your VIP guests. Instead of a price reduction for all rooms across the board, negotiate suites and exclusive services for them – the impact in terms of their satisfaction will more than repay the effort.

## STEP 5 – PUT TOGETHER A FULL COUNTDOWN SCHEDULE

**This will enable you to list all the various planning stages, from the initial preparations through to the end of the event. Taking the long-term view will enable you to build in the various lead times more easily.**

- For example make sure that you confirm your venue bookings with your contact at the earliest possible stage, providing details of the arrangements you require: theatre-style, classroom-style or cabaret-style for meetings; waiter service, buffet, or finger buffet for lunches and dinners.
- Send your deposits in good time.
- Be sure to allow sufficient time for producing your publicity materials – posters, invitations, brochures, etc. You should allow at least four weeks as the printing alone can take several weeks.

## STEP 6 – PLAN THE EVENT PROGRAMME IN DETAIL

**Draw up a day-by-day, hour by hour programme, specifying start and end times, locations, the number of people expected and specific requirements.**

- Because working days can be very intense we would advise you to allow appropriate breaks for your delegates. A lunch break generally lasts 60 minutes. Add an extra 20 minutes per course for a dinner. Breakfast takes between 30 and 40 minutes. For coffee breaks we suggest that you allow 15 minutes for up to 100 participants, 30 minutes for up to 1,000 participants and 30 to 45 minutes for groups of more than 1,000.

## STEP 7 – LAST-MINUTE ARRANGEMENTS

**In order to ensure that your event runs smoothly review all elements of your plan with your contact at the venue. Communication is the key to a successful event.**

- Just before the event (ideally the day before), it is advisable to hold a dress rehearsal for all your speakers.  
For seminars, make any necessary technical adjustments on the production side (audio, video, etc.), test the Powerpoint presentations and finalise the last details with your speakers.
- If you are staging a gala dinner and show, ensure that the performers rehearse with the technicians for any necessary adjustments to lighting and sound. Check menus and seating arrangements on the day itself.
- Use these rehearsals to get to know the people who will be vital to the success of your event on the day.

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## STEP 8 – PROMOTING YOUR EVENT

**This is one of the most important steps.**

- Send a detailed event programme to your participants two to four weeks before the event itself and ask them to send back a reply coupon by a specific deadline. This will enable you to calculate the number of people taking part. For events targeting an external audience the general rule is to expect one attendee per ten people invited.
- Your invitations or event programme can be sent by post but we suggest you send them by e-mail. Using a contact management programme simplifies large-scale mail-outs, reduces costs and allows you to track your contacts. It is also easy to follow up your invitations, if necessary, in the week before the event.
- If you are organising a team-building activity or gala dinner be sure to include details of the appropriate dress code.

## STEP 9 – MEASURE YOUR PARTICIPANTS' SATISFACTION

- Bring together all the people who helped you organise the event for a debriefing.
- Two weeks after the event, send a questionnaire to your participants, including questions about the choice of venue, the quality of the programme, the accommodation, the catering and the activities offered. This will enable you to assess whether your goals were achieved. The results will also assist you in planning subsequent events.

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