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Event Planning: Understanding the Process Through Gained Experience and Research

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Event Planning: Understanding the Process Through Gained Experience and Research

Taylor Ansuini

An Abstract of a Project
in
Creativity and Change Leadership

Submitted in Partial Fulfillment
of the Requirements
for the Degree of

Master of Science

May 2022

Buffalo State
State University of New York
Department of Creativity and Change Leadership

ABSTRACT OF PROJECT

Event Planning: Understanding the Process Through Gained Experience and Research

Event planning is a complex and challenging job as it requires a creative, driven individual who excels as a multitasker and problem solver. The focus of this master's project is to engage in a deeper understanding and gain volunteer experience as part of an event planner's team in preparation for a desired future career in the field. Both communication with and opportunities to work with local event planners assisted with accelerating experience and insight into the field of event planning. The outcomes of the project include insights into various volunteer experiences and lessons learned from conversations with various experts as well as informed thinking through examining literature and searching for resources and organizations related to event planning. An additional unexpected outcome includes an unsolicited invitation to accept a job as an event planner which the author accepted.

Key words: event planning, event planner, events, creativity, problem solving, wedding planner, client

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May 21, 2022

Buffalo State
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Department of Creativity and Change Leadership

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SECTION ONE: BACKGROUND TO THE PROJECT

Purpose and Description of Project

As a long-term career goal of mine, I have aspired to be an event planner. There are many variables that have delayed my experience, but primarily, the COVID-19 pandemic caused most events to take a pause. As a result, I was unable to start gaining experience in the event planning field after finishing my undergraduate education. As a result of the long-drawn-out pandemic, I was concerned that I would be leaving graduate school still lacking the knowledge and experience needed to be marketable and succeed as an event planner. The goal of this project is to gain “experience without getting experience” in events. In other words, I use this semester to gain first-hand knowledge in the field from professional event planners, so upon graduation I will feel more confident entering this field. My goals for this master’s project is to gain invaluable insights and develop a strong knowledge base. I will cultivate a thorough understanding of the process of event planning from the ideation of a new event, to the timeline, to the day of event, through the completion of the event. My plan to accomplish this is to speak with numerous event planners in the area, shadow event planners both in the planning stages and during the actual events, and read valuable articles and literature on the subject.

Through this process, my goals are the following:

- To gain an understanding of what goes into planning and executing a highly successful event including the possible obstacles
- To learn about the specifics including where to get started with an event and how the timeline should run
- To see where and how I can best use my creativity skills when event planning
- To test my creative problem solving and leadership skills
- To further understand and develop my conflict resolution skills and see how I can use this effectively in event planning for future employment
- To build valuable connections with members of the local event planning community

Rationale for Selection

Event planning is what I am looking to do when I graduate with my Master of Science in Creativity and Change Leadership. This is a career path I feel that I would excel in and also love. I love how dynamic the environment would be and also how satisfying and fulfilling the end result would be. I would love to bring joy to the community, by bringing people together and watching the attendees create memories at the events I organize. Additionally, I love that the field of event planning will give me the freedom to be creative and original. I will be able to put my own personal flair on an event to create a unique and memorable experience for the people attending. I think that this project is the perfect opportunity for me to learn more about something that interests me while also benefiting me for my future career, making it extremely valuable.

Given the first-hand knowledge I will gain from the professional event planners that I communicate with and observe, this project should help me succeed in any direction I decide to take this career path. Not only will this project provide me with valuable knowledge, but this will limit my stress and anxiety moving forward leading to a more fulfilling career and happier life post-graduation.

SECTION TWO: PERTINENT LITERATURE AND RESOURCES

The literature that I plan to explore will be sources that discuss the general steps to becoming an event planner. The sources identified below are valuable resources when it comes to event planning as a whole and will provide me with a general background on the subject before I meet with the actual event planners. These articles' primary focus is to outline the steps to becoming a successful event planner and the process of event planning. I will also review literature about the skills needed to be a successful event planner and some tools to make the process easier when planning. Additionally, I will gain practical, real-world knowledge by learning directly from local event planners.

Asana. (2008). *Manage your team's work, projects, & tasks online* . Asana.

<https://asana.com/?noredirect>

This source is a great organizational tool I can use for planning and organization specifically built for event planners.

Dowd, M. (2018, June 27). *Where do I start if I want to become an event planner?*

Work. <https://work.chron.com/start-want-become-event-planner-25329.html>

This source discusses how to get started in the event planning field with no experience and how to gain that experience as a beginner.

How to become an event planner. Learn About Event Planning. (2020, November 27). <https://eventplanning.com/become-an-event-planner/>

This source differentiates the types of event planning and the pros and cons in working for a company vs. working for yourself. It also gives advice regarding how to successfully market yourself and grow your business if you have your own start-up company.

How to become an event planner. Thimble. (2021, July 27).

<https://www.thimble.com/blog/how-to-become-an-event-planner>

This source talks about the importance of multitasking for event planners and the many hats they wear. It also discusses the value of getting a certification in event planning to help improve your credentials.

Institute-of-event-management.com. 2022. *Event Planner differences | International*

Institute of Event Management. [online] <https://institute-of-event->

[management.com/what-makes-social-event-planners-different-corporate-event-](https://institute-of-event-management.com/what-makes-social-event-planners-different-corporate-event-)

[planners](https://institute-of-event-management.com/what-makes-social-event-planners-different-corporate-event-planners)

This source delineates the differences between corporate and social event planners and the duties each holds.

Institute-of-event-management.com. 2022. *Five Tips to Planning a Successful*

Fundraising Event | International Institute of Event Management. [online]

<https://institute-of-event-management.com/five-tips-planning-successful-fundraising-event>

This source describes the steps that need to be taken to begin fundraising for an event and the importance and challenges of fundraising in event planning.

Institute-of-event-management.com. 2022. *Running a Virtual Event* | *International Institute of Event Management*. [online] <https://institute-of-event-management.com/running-virtual-event>

This source provides key tips and tricks to running a successful remote event, which is important information following the pandemic and the shift to many events and meetings being virtual.

Institute-of-event-management.com. 2022. *4 Useful Hacks To Ace Your Event Management Job Interview* | *International Institute of Event Management*. [online] <https://institute-of-event-management.com/4-useful-hacks-ace-your-event-management-job-interview>

This source provides key insights into job interviews and how to succeed getting a job in event planning and identifies the important skills to discuss in the interview.

Social Tables. (2021, May 5). *Get started in event planning: 5 simple steps*. Social Tables. <https://www.socialtables.com/blog/event-planning/getting-started/>

This source gives advice on how to get started in event planning by breaking it down into 5 steps. It describes the skills and qualities it takes to be a successful event planner.

Versatile & Robust project management software. Wrike. (2006).

<https://www.wrike.com/vn/>

This source is another great organizational tool for event planners.

After reading and analyzing the literature, I plan to reach out to many different event planners in the area to get personal advice. I will start by reaching out to individuals who are Buffalo State Alumni since I have personal connections to them. They are Beth Slazak, Manager of Events and Education at the Creative Education Foundation, Kristen Peterson, the former director of CPSI and current creativity facilitator and Rachel Voelkle-Kuhlmann, a past member of the program who recently started her own company called Joybrick and who has done event planning in Buffalo.

Then I will reach out to some local schools and organizations to get in contact with their event planners. Those locations are:

Step Out Buffalo, Buffalo

Sacred Heart Academy, Buffalo

Nardin Academy, Buffalo

Canalside, Buffalo

Buffalo RiverWorks, Buffalo

Lastly, I will reach out to private event planning companies. Most of them focus on weddings and birthday parties and are often run by one person or a small team. They are:

Rachel Stacy wedding planner, Chicago

EVL Events, Buffalo

Social Maven, Buffalo

Katharine Phillips Event and Design, Buffalo

Good Neighbor Events, Buffalo

Tolleywood Event Production, Buffalo

Events by Brielle, Buffalo

Twenty6 Productions, Buffalo

Lilypad Wedding and Events, Buffalo

Party Hardy, Buffalo

Confetti Events, Buffalo

3 Buffalo Girls Event Center, Buffalo

Kenslei Design & Rentals, Buffalo

The Wedding Agent, Buffalo

K22R Event Planning, Buffalo

Bushel & A peck Event Creative Team, Buffalo

Levitate Balloons and Event Decor, Buffalo

Event Artistry, Inc., Buffalo

Little Bird Party Co., Buffalo

Buffalo's Premier Events, Buffalo

Queendom Event Planning, Buffalo

SECTION THREE: PROCESS PLAN

Plan to Achieve Your Goals and Outcomes

To achieve my goal of learning more and developing a strong knowledge base in event planning, I will continue to review literature and I also will reach out to numerous event planners. I plan to contact 10-15 different event planners. I will do this over Zoom or in person if they feel comfortable. I would love to discuss their work as an event planner and potentially shadow them, either in the preparation process leading up to the event, setting up the event or during the event. I don't count on this, mostly due to the limited amount of time I have and not being able to control the date of other people' and organization's events but also due to the pandemic and events being limited in attendance and in general.

From these people, I would like to learn more about how they get started, some tips and tricks they have, things to avoid when planning an event, the timeline they follow, how they reach out to people, who they reach out to and anything else they would like to tell me. I will take in-depth notes from these discussions and gather them in a document. I am curious to see how people who are all in the same field operate differently but also in what areas they have a similar process. I will also further my knowledge by reading valuable literature related to event planning to receive additional useful advice and information. After each of these discussions, reading literature and shadowing the event planners, I will compile all the information into a document that I will use as a future resource.

I reached out with the following message via Facebook messenger, mostly because this felt more personal, and with an email follow up on their contact page.

“Hi! My name is Taylor Ansuini and I am in my last semester of Graduate School at Buffalo State studying Creativity and Change Leadership. I am currently working on my master’s project focusing on Event Planning. The goal on this project is to gain knowledge in the field before I graduate since my goal is to work in events. I am reaching out wondering if you would be interested in helping me. I found your company online through researching local event planners and I would love to chat with you and learn more about your process. It could be as easy as a phone call or Zoom meeting for 20 minutes. Please let me know if you're interested! I would love to chat with you!”

If they responded, I replied with:

Thank you so much for getting back to me, I am so excited to learn more about what you do!

As a heads up, here are some things I would like to know in our meeting, if you want to give them some thought beforehand!

- Your favorite and least favorite aspects of event planning
- What is your timeline like when starting a new event
- Do you have any tips or tricks you want to share that make your process easier

- What is a problem you've run into before with an event and how did you solve it
- Where do you use your creativity when event planning

I would love to set up a Zoom meeting if you are comfortable. If not, a phone call is also great! Let me know what your availability is like in the next couple weeks.

I look forward to hearing from you,

Taylor Ansuini

Project Timeline

Estimated Deadline	Weekly Goals
<p>Week 1 2/14-2/20</p> <p>Concept paper due.</p> <p>Reach out to all the event planners.</p>	<p>Draft an email for the local event planners with the goal of convincing them to meet with me. Find their emails and reach out via email at the beginning of the week. By the end of the week if they haven't responded, follow up with a second email or reach out on their business's Facebook page. Respond to anyone that has answered and set up a meeting (in person or on Zoom) in the next 2-4 weeks based on their schedule. Create a list of questions I want to have ready to ask. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>
<p>Week 2 2/21-2/27</p>	<p>Continue to follow through with anyone that has replied and set up a meeting as soon as they can. Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>

<p>Week 3 2/28-3/6</p>	<p>Continue to follow through with anyone that has replied and set up a meeting as soon as they can. Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>
<p>Week 4 3/7-3/13</p>	<p>Continue to follow through with anyone that has replied and set up a meeting as soon as they can. Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>
<p>Week 5 3/14-3/20</p> <p>Goal to have held 5 meetings by this point</p>	<p>Continue to follow through with anyone that has replied and set up a meeting as soon as they can. Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>
<p>Week 6 3/21-3/27</p> <p>1-3 DUE</p>	<p>Continue to follow through with anyone that has replied and set up a meeting as soon as they can. Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.</p>
<p>Week 7 3/28-4/3</p>	<p>Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what</p>

	they do and tailor my questions to them.
Week 8 4/4-4/10 Goal to have held 10 meetings by this point	Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.
Week 9 4/11-4/17	Hold meetings with event planners who have responded, get permission and record the meetings and type notes while they speak, and add more details after to a document with all the information from each meeting. Follow through post meetings and thank them via email. Research any company/person that has answered and understand what they do and tailor my questions to them.
Week 10 4/18-4/24	Begin organizing all the data from each meeting in the document. Ideally in categories like what kind of event (wedding, school, birthday party) and the type of work being done. These categories will be along the lines of, getting started, things to avoid, reaching out, organization, safety, vendors, etc...
Week 11 4/25-5/1 Finish adding all of the data	Continue compiling all the information from each meeting, or possible shadow experience and start putting it into an organized, final presentation. A How-To guide for event planning. Along with a small PowerPoint presentation to show to the class.
Week 12 5/2-5/8 Finish PowerPoint	Work on finishing the How-To guide and the PowerPoint so it is neat and presentable, but also easy to understand, for others but mostly for myself since I will use this as a major future resource.
Week 13 5/9- end Masters Project due	Finish any missing details and add some touch ups. Make sure both projects are completed and ready to be presented.

Evaluation Plan

The main way this project will be evaluated will be how I personally feel at the conclusion of the project. I will self-reflect at the end of this and see how much my

confidence has grown in event planning. Once I finish this project, how much more confident do I feel entering this field? I believe based on the level of confidence I have gained throughout this journey; I can measure the success of this project. I would like to be able to answer the following questions:

- How do I start an event?
- What timeline should I follow?
- What is something I should do first and what is something I should do last in the process?
- Are there things that I should avoid, and what are they?
- How can I ensure safety at an event?
- Do I feel that I can successfully run an event all by myself?
- How does creative problem-solving play into event planning?
- How can I use my creativity in event planning?

If I have solid answers to each of these questions, I know that I've done a good job throughout this project and have reached the goal I'm aiming for. Additionally, I will judge the success of this project by asking for peers' feedback. And lastly, I can judge the success of this project by the number and quality of connections I have made in the process.

SECTION FOUR: OUTCOMES

I had the opportunity to interact with seven different event planners. Each one offered different and valuable insight into the field. I had the opportunity to speak with some and shadow others. I will describe my experience with each planner and what I learned below. To better understand each event planner, I have a table describing the role they play in their company, as well as what type of events they hold.

Planner	Type of planner	Who I spoke with
Event Planner 1	Social Events	Co-Founder and Director of Storytelling
Event Planner 2	Weddings and Some Corporate Events	Lead Coordinator and Owner
Event Planner 3	Wedding and Bridal Showers	Lead Coordinator and Owner
Event Planner 4	Weddings, Bridal and Baby Showers and Birthday Parties	Owner
Event Planner 5	Social Events	Owner and Team
Event Planner 6	Weddings and some Corporate Events	Lead Coordinator and Owner
Event Planner 7	Conferences and Corporate events	Lead Organizer

When I spoke with the planners, I asked four main questions:

- What is your favorite and least favorite aspect of event planning?

- What is the timeline like when planning a new event and what is the timeline like when planning an annual event that has already been put on in past years?
- What is a problem you've run into before and how did you solve it?
- Where do you use your creativity?

I then asked if they had any additional advice for me or any special tips or tricks they always keep in mind when planning. I asked these particular questions because I felt they were the main areas of uncertainty for myself in this field. I also felt that these questions allowed for open ended responses, unique to each planner.

It was important to me that I kept these planners anonymous and used “they/them” pronouns rather than using “she” or “he”. I did not feel that the planners’ gender was necessary to share. More importantly, I wanted to keep the planners and their businesses anonymous. That is also the reasoning for referring to them by “planner” rather than their company name. I felt that they would be more likely to communicate candidly with me about their positive and negative experiences, without anxiety of possible backlash if they were to share a negative experience. Being able to hear their stressful experiences was crucial for me to better understand how I could successfully avoid or navigate similar situations moving forward. I did not want the planners to feel like they should hold back in case their negative experience involved a particular client or vendor. Next, in my results section, I will overview my key learnings from each planner after speaking with them and/or shadowing them in person.

Event Planner One

I spoke with this event planner and met with their Co-Founder and Director of Storytelling. This organization holds various types of social events around the city of Buffalo, such as festivals or bar crawls. The events are usually quite large, hosting a few thousand people. Their favorite part of event planning is conceptualization. They explained that they find this aspect very rewarding. Additionally, putting all the pieces together and seeing the production come together on the event day was very rewarding to them. The negative aspects identified were that planning can be quite stressful and time consuming and also that vendors can often be difficult to work with. It is important for these planners to ensure that their events are different from competitors and that they create an organized, clean event experience and an enjoyable guest experience. These planners accomplish this by asking important questions beforehand and getting input from the different people that will be involved in the event as well as specifically bringing someone on the team like a vendor for a different perspective.

When creating a new event, these planners indicated they will begin the planning process about twelve months out and will start event marketing and promotion six months out. They explained it usually takes a few years to perfect a new event. If the event goes well, they secure the venue immediately after that event for the following year. For a pre-existing event, they start the planning process eight months before and start marketing the event one month before.

The principal planner carries a binder detailing everything about each event, everywhere they go to insure efficiency and organization. The planner also emphasized

to never leave anything to the day of the event and to make every effort to ensure that everything that can possibly be done, is taken care of before the event day. They advised to always assume that things will go wrong and gave the example of a festival they had planned in Rochester. The organization lacked credibility since it was outside of Buffalo, which is where the company is predominantly known, so some of the participating bars dropped out last minute. This was a significant problem because guests expected a certain number of drinks with their ticket, and less bars meant the drink quota wasn't going to be met. To solve this problem, the planner found alternative bars to work with and also created a sample drink. The company brought their own drink samples for the guests to make sure the guests were getting the number of drinks they paid for. The planner advised how important it was to always have a backup plan and be able to pivot. In this case, they didn't buy the supplies to make drinks ahead of time but had an ingredient/shopping list prepared just in case. Lastly, I learned that they use their creativity primarily in the concept creation of the event and the marketing of the event to draw more people in.

Event Planner Two

This event planner is based out of Chicago. They primarily book weddings but also hold corporate events. The average cost of one of their weddings is around \$60,000. They prefer working corporate events because there is more money involved. When it's a wedding, the money is personal so you can only spend as much money as a couple has, whereas large corporate events have a considerably larger budget and

the planners get paid significantly more. They explained that their favorite things about event planning was developing relationships with clients, and that with each event, the concept is always new, and the planner can use their creativity. Their least favorite part of event planning was working with different vendor teams. They indicated that vendors can sometimes be difficult or unprofessional. They explained that communication with vendors can often be challenging since they are not part of the team, and only meet once before the event.

An example of when this planner has run into a conflict was during the Fourth of July, when they were holding a wedding. There was a citywide power outage during cocktail hour with about 200 guests in attendance. There were no lights, music and the venue lost the ability to cook food. The planner delegated tasks to multiple people to figure out who would prepare cold food, and how they could pivot the event to keep guests entertained. This event was particularly challenging because they also had issues with protests outside of the venue since they are stationed in a large city. "You just have to expect things like this to happen, and not be phased and continue on ", this planner advised.

The most important aspect of event planning to this planner is what the guest experience is like. This planner sees leadership and task management as critical skills to running their business. They start their timeline for a new wedding about one year out and corporate events around six to twelve months out. They also offer a less expensive coordination service that starts about two months out from the wedding, where in this case, the client has already organized the majority of the wedding.

Some tips and tricks they offered were to:

- Always use lists and spreadsheets to keep yourself organized
- Discuss the budget during the first meeting
- Put all of your bookings and appointments in a Google calendar
- Keep everything in writing, so nothing can be blamed on you
- Hold monthly check-in meetings leading up to an event
- Create lists
- Always send follow-up emails
- Keep a separate file in Google Docs for each event
- Always take detailed notes after an event as a post evaluation

Event Planner Three

I spoke to this planner who holds upscale weddings, bridal and baby showers with the average cost of a wedding being around \$45,000. They mentioned that their favorite aspect of event planning is watching it come together from beginning to end and taking the time to put their creativity into the design. They love this part because it is rewarding to see the results. Their least favorite part of event planning is when clients don't respond or communicate well, which then delays the planning process.

This planner works with various event timelines, in the past, they have planned weddings three months in advance, and as far out as two years in advance. They don't mind when events are last minute. However, it is ideal that when creating a new event, that they have 12 to 18 months to plan it. This planner will typically organize about 50

weddings a year. To make their process easier, they focus on organization. They use a software called ISLE planner and also use Google Docs to create folders and sub folders for each event. They print a thorough timeline with event details for the event day and also give this to the vendor, so they are well informed regarding the plan.

This planner focuses on the guest experience by creating great event flow and direction for the guests by having no awkward gaps in time at the event. They also allow their clients to choose vendors that are right for them. Upon the first meeting with a new couple or corporation, this planner starts from scratch by asking the clients to describe their vision and expectations. The planner then uses this information to create a game plan. When problem-solving the planner does some task delegation, but mostly handles the problem independently, as well as in conjunction with their team. They also stressed the importance of being able to think on their feet. If they can avoid it, the planning team will never let the client know if there is a problem and will solve it independently. Lastly, they use their creativity in event planning when they do anything that involves design thinking.

Event Planner Four

I met with the owner of this event company who primarily books weddings but also books birthday parties and bridal and baby showers with the average cost of a wedding being around \$25,000. This planner described the best part of event planning as being how much love is in that event. The planner explained that when an event is being put together, there is a room full of community that was built through the event.

This planner also loves owning their own business and having creativity and flexibility with their schedule and events. “There is so much love, pure love and excitement in the room, it gives people a place to connect”. This planner’s least favorite part of event planning was the irregularity of their schedule and having to work a lot of weekends and late nights.

The timeline for full-service events are 12 months out with monthly meetings to check-in and then weekly meetings leading up to the event where they will then walk through a design plan. They use their creativity by creating an enjoyable guest experience and finding things that matter to the clients to help tell their story, through appropriate vendors. They prioritize giving the guests something to remember.

Some further notable points this planner made was that they are a very organized person and take good notes, but they do not have a type-A personality. They hold a lot of check-ins with their clients and send Google doc forms for them to fill out so their wants and expectations are in writing. The planner strongly advised me to always put everything in writing! They also recommended keeping an emergency kit on hand, like tape, thread and hand sanitizer so when things go wrong there are some easy fixes close by.

This organization stresses the importance of gender inclusivity. They are careful to not focus too much on the bride or heterosexual relationships and strive to make sure both partners are included. They explained that it is important to assume that not all bookings are cisgendered weddings and that it is necessary to use inclusive terms like, “wedding party” and not “bridal party”. As well as to ask questions with wording like, “Is

anyone walking you down the aisle?” rather than assuming that the bride's father is walking them down. Additionally, “Do you want to do a first dance?” rather than “When do you want to do a first dance?” And finally, using the word “partner” rather than “fiancé” or “husband”.

Event Planner Five

I shadowed this event company at a large festival-like event at a large indoor venue in Buffalo. I worked with the founder and the team. My job was working the door, handing out flyers and coupons to the 1200 attendees, as well as some small random tasks to help set up. Each member of this event either paid \$135 for a VIP ticket or \$35 for a general admission ticket. With these tickets, the attendees got a whiskey tasting at each of the 70 vendor tables, a glass and shot at the door, and six cocktails presented as coupons in their pamphlet. Obviously, this event became quite rowdy, and guests were visibly intoxicated by the end, as well as some who were heavily intoxicated and were asked to leave. The company anticipated this as it is a common occurrence with these types of events. They had garbage cans and water set up by the door and also did not permit the overly intoxicated guests to leave the premises, so the venue was not responsible for over serving.

The owner explained that the best and worst part about being an event planner is working with the venue. They said the venue has so much to offer so this can be really great and there's a lot to work with. Also, that they have the freedom and space to do what they want. The venue can also be the worst because the event company is at

the mercy of the venue, and they can change anything at any time without notice or warning. This happened during the event, when the venue decided to open all of the food stands that the event company was told would remain closed for the duration of the event. By doing this, the venue was able to make a lot of extra money, possibly taking away from money that the event itself made.

The owner really stressed the importance of smiling and being friendly to every guest and that the customer is always right. They were excellent at this, especially in an environment where most of the guests were at least somewhat intoxicated and more challenging to handle. This event was much easier for them to plan since it was created by somebody else, and they were just facilitating it. However, they made sure to sign a contract about six months prior and had all the employees get there ten hours early to set up to make sure there was plenty of time before the event and nothing was rushed. They asked the vendors to get there between two and four hours early to set up their stations as well.

Event Planner Six

I spoke with the owner of this event company and was fortunate to shadow them as well. They book both middle tier to upscale weddings as well as corporate events. These weddings are on the more expensive side with an average wedding costing around \$40,000. This planner gained experience in event planning by beginning in hospitality and working their way up to full-service planning. They worked in catering, then the hotel industry and later went to university for public relations and culinary arts. The owner stressed that education only gets you so far and the best way to get into

event planning is to get experience by shadowing events, going to in-office days before the event and joining client meetings.

This planner's favorite part of event planning is creating memories for people while their least favorite part of event planning is managing the emotions for their clients, which there is a lot of in weddings. Also, many times people don't really understand what event planners do.

They use their creativity in the core production of the event and make sure the event runs seamlessly from back to front. If the event is not working soundly from the back, it is not going to work at all. They start from the bottom up by working with the vendors and the caterers, making sure everyone is on the same page.

They book about 20 to 30 weddings in a season which runs from about April to November. For wedding planning, the timeline to start planning is about 18 to 24 months out and for a corporate event it's about 18 months out. For an existing annual corporate event, they start planning about eight months out and start marketing about four months out.

The biggest challenge they've dealt with is the pandemic. They said rental companies were expecting a \$10,000 minimum to rent from their company which is very hard for most clients to afford. They've also run into problems with Covid and to help alleviate stress, they remain informed with current guidelines by communicating with the health department. They've run into issues because people still want to hold their weddings even with the restrictions, which has caused them to lose clients. Because

they lost bookings, they've made sure to create a strong contract so they will not lose the money for people firing them for following protocol.

Finally, they made sure to let me know not to let the client derail what the planner is doing in meetings and invited me to come and join some.

I was able to visit this planner's office following this discussion to learn more about what they do and have a chance to see what their office is like and observe what they're working on. The planner showed me around, so I could see how they organize all of their wedding and event equipment like plates, linens, wine glasses and endless decorations. We sat down together and they went through the organization of everything on their office computer. I was able to see the program that they use and how it works which was incredibly helpful. There's so much organization that goes into each event. It was impressive to see how intricately everything was broken down, so it was easy to follow for not only the planners but the clients as well. The clients had access to a lot of the documents, so they were not confused about what was happening. They could also see what they were spending on each vendor and all the contact information for each of these vendors as well. The vendors had access to these documents so they could see the pricing as well as the date of the event and the location of it. The planner made sure to include the same information in many different places so even if the clients or vendors just skimmed the documents, they still ended up reading it at some point.

Each event was broken down into a very thorough and detailed timeline and these timelines were printed out for everybody working the event including the wedding party. The planner even had a weather app set to notify the team if there was any

weather or rain that would be starting soon, the weather was always updated on these documents as well to help them better plan for the event day.

I then had a chance to shadow a styled shoot. The event company set up a “mock wedding” where there were two models posing as two brides. There was a professional makeup artist there who got them ready and styled them. This event planner created a concept, had a baker create a cake, a florist, and somebody to bring furniture rentals, all to match the concept. This event was hosted at a small wedding venue in Rochester.

A photographer came to photograph everything which gave the venue some press and hopefully helps to increase their bookings. The florist, baker, rental service and even the linen company that this event planner rented tablecloth and napkins from as well also benefited from this shoot. All these vendors were given more exposure on social media by doing this. The venue will hopefully receive more bookings by showing clients through social media what the venue has the potential to look like. Additionally, this event planner can showcase different and unique styles to future clients to showcase the diversity of what their company can put together.

My role was assisting in the set-up of all the decor. I unboxed and set up champagne glasses, wine glasses, water glasses, silverware, plates and chargers, chairs and then took photos. This was an excellent experience, and I was able to see how everything was organized and what the process for setting up a styled shoot consisted of. This planner expected perfection, since the company name was attached to these photos. I think this is imperative in a detail-oriented field like this.

Event Planner Seven

I met with this event planner who works for themselves as an independent contractor that is hired to work corporate events and plan conferences for both small (30 people) and large groups (1000 people) around the country. An average price for a ticket is around \$2100 general admission, \$1000 for teachers and \$650 for university students. This person got into event planning by volunteering and working their way up, working in logistics and also by having connections to those who are already in the field. Their goal of every event is to spark new ideas and new thoughts which is what this planner loves.

Their favorite part of event planning is creating something “memorable, exploratory and surprisingly delightful”. Their least favorite part of the planning is dealing with the fire marshals. The fire marshal’s usually have rules that the planners will have to abide by which can sometimes make the decoration of the event challenging. The planner also said that it is hard to plan events when they are not entirely sure what they are allowed or not allowed to do at the particular venue, since each town seems to have different regulations with fire safety. This can create problems for the team, like when they were setting up an event and spent hours putting up lights and decorations and then before the event started were told that they had to take everything down. Other problems they've run into have been having to change venues because there's not enough space available and not enough rooms to hold different conferences. It is hard

to find buildings big enough for large conferences. To help solve these problems, they always visit the venues beforehand and get to know the people running the venue. This way they can scope out the space and also ask questions to better figure out how they can organize the space and not run into issues with the fire department.

The timeline they use to set up an event is about 12 to 18 months out. They want to know the name of the event and its logo to reveal the year before so people can look forward to next year's event. They begin the set up for that event about a week before, and for a brand-new event, they begin planning about 18 months out. Some additional things that they always recommend remembering is to be gracious and always send thank you cards after an event. They send them to staff and also vendors and the venue. They said it makes it easier to work with them in future and to build good rapport. They also suggested making care packages for their staff like bringing water bottles or hand sanitizer that they can use. They suggested creating a theme for each event which makes organization easier. They also stressed the importance of making sure that the team always feels appreciated.

Information Gathered Through Additional Resources

In addition to speaking with and following event planners, I also continued to examine the literature and look at resources to see what I could learn about event planning. Below are some additional resources I inquired into and some of my learnings from those resources.

Social Tables. (2021, May 5). *Get started in event planning: 5 simple steps*. Social Tables. <https://www.socialtables.com/blog/event-planning/getting-started/>

- Build a strong foundation of knowledge in the field before entering through interning or volunteering at events
- The industry is growing faster than average
- Create a diverse portfolio by working different types of events and having experience in different areas like marketing or PR or design
- Get them testimonials from clients to show connections
- Use your own personal creative style in your work to make it unique
- Use programs like: Canva, Social Tables, Grammarly, Appointlet, WordPress, Wedding Spot
- MEEC- Meetings, Expositions, Events, and Conventions
- SMERF- Social, Military, Educational, Religious, and Fraternal
- Build positive client rapport by being open minded and asking a lot of questions and being personal by telling personal stories
- Get business cards
- Always follow up within 24 hours

Source: Social Tables

How to become an event planner. Thimble. (2021, July 27).

<https://www.thimble.com/blog/how-to-become-an-event-planner>

- Event planners wear many hats and need to be good multitaskers
 - Manage client expectations
 - Plan the event's time, cost, and location
 - Inspect venues based on client requirements
 - Budget venues, catering companies, and other service providers
 - Coordinate transportation, housing, and food/ vendors
 - Design event activities to meet clients' vision
 - Arrange and curate event entertainment and layout
 - Manage event budget, bills, and payments
 - Communicate with all parties including vendors and attendees

- Get an event planning certification for more credibility
 - Certified Meeting Professional (CMP)
 - Certified Government Meeting Professional (CGMP)

- Find an area to specialize in like weddings or birthday parties

- Gain hands on experience beforehand through volunteering, networking or education

- Organize small events for small businesses or family and friends

- Get insurance if you're a business owner like general liability insurance to protect against property damage or injury

Dowd, M. (2018, June 27). *Where do I start if I want to become an event planner?*

Work. <https://work.chron.com/start-want-become-event-planner-25329.html>

- Create a shared vision and communicate it to everyone involved and attending
- Event planners wear many hats and need to get good at multitasking
- Make a contingency plan for weather related events
- Make sure the venue has a license if they are serving alcohol
- Start getting into the industry by volunteering
- Get a certification in event planning, wedding planning or hospitality management
- Start working a corporate job before going off and starting your own business
- The is faster than average growth in this field

How to become an event planner. Learn About Event Planning. (2020, November 27). <https://eventplanning.com/become-an-event-planner/>

- There are two types of planners, social planners and corporate planners
 - Social planners plan: weddings, birthday parties, anniversaries, holidays, baby showers, reunions and bar mitzvahs
 - Corporate planners plan: meetings, company events, seminars, conversations, associations and charities
- It is best to master one category before going into the other

- Take a course to help build basic contract, proposal and budgeting sheets to use in the future rather than building them from scratch
- Volunteer for friends or family to plan their small events for practice to start building a portfolio.
 - After their event, ask them for a testimonial
- For a new business, put the business on Yelp, Craigslist or WeddingWire to attract new clients
- Get experience through education, volunteering or an internship
- If you land a job as an event planner you can be responsible for the businesses:
 - Holiday parties
 - Retreats
 - Board meetings
 - Stockholder meetings
 - Award ceremonies
 - Executive trips
 - Trade shows
 - Conventions
 - Client entertainment
 - Seminars
- Working for a company like this is a good start because there is a flexible and higher budget. Additionally, they already have a client base, so you don't have to spend as much time building one, just maintaining an existing one.
- The downside of working for an event planning company is you can't keep all of the profit and you can't be as creative

- Get experience by working directly with a vendor like in catering or floral decor to see how things are run behind the scenes
- Create your own website where you can put your portfolio and testimonials

Institute-of-event-management.com. 2022. *Event Planner differences* | *International Institute of Event Management*. [online] <https://institute-of-event-management.com/what-makes-social-event-planners-different-corporate-event-planners>

- A social planner plans weddings, anniversaries and parties which is different from a corporate planner because they manage emotional attachment as well
- Look for nonverbal cues Like posture and facial expressions to better read the room and see if anybody at the event especially the main clients seem to be in distress
- There's less room for flexibility with the budget for social events since the budget is usually comprised of personal funds, loans and gifts
- A wedding is a once in a lifetime event unlike a corporate event

Institute-of-event-management.com. 2022. *Five Tips to Planning a Successful Fundraising Event* | *International Institute of Event Management*. [online] <https://institute-of-event-management.com/five-tips-planning-successful-fundraising-event>

- Explore more with different types of fundraising and don't be afraid to set high expectations for large fundraising amounts
- Make sure to explain in detail why you were fundraising for your event or your company, so people are more inclined to donate if they know what the money is going towards
- If you never start planning for something too early and make sure when you are planning, you are extremely detailed to help illuminate any issues
- Don't forget to promote your event, use social media but also word-of-mouth, the promotion is just as important as the fundraising
- You don't have to spend a lot of money on a venue to hold an event, cheaper venues like outdoor, backyards and tents can be just as successful and can be a big money saver

Institute-of-event-management.com. 2022. *Running a Virtual Event | International Institute of Event Management*. [online] <https://institute-of-event-management.com/running-virtual-event>

- If an event is virtual make sure to make a website for it to help promotion a large FAQ (fact answer questions) section
- Make sure there is a registration section on the website for the event with a guide of how to attend it virtually
- Make sure there's a messaging feature so audience can ask questions
- Use a live polling software so the audience can participate

- Create a hashtag for the event
- Create virtual room so people can network

Institute-of-event-management.com. 2022. *4 Useful Hacks To Ace Your Event*

Management Job Interview | International Institute of Event Management. [online]

<https://institute-of-event-management.com/4-useful-hacks-ace-your-event-management-job-interview>

- Always arrive to things 10-15 minutes before to help plan for unknowns, complete paperwork and observe the office environment
- Be prepared to ask good questions
- Review their website and social media beforehand
- Be authentic and confident

As a result of speaking with planners and through researching additional resources, I've created a list of items to keep in an emergency kit to bring to each event:

- Scissors
- Mouth wash
- Ibuprofen or another type of pain reliever
- Antacids/ Tums
- Different sizes of batteries
- Chapstick
- Sunscreen
- Benadryl
- Deodorant
- Bug spray
- Tissues
- Thread
- Sewing needle
- Mints

- Clorox wipes
- Command strips
- Magic eraser
- Masks
- Lighter
- Tide to go pen
- Hand sanitizer
- Lint roller
- Chargers
- Floss
- Fabric tape
- Anti-itch cream
- Feminine products
- Band-Aids
- Razor
- Dry shampoo
- Neosporin
- Zip ties
- Adhesive dots
- First aid kit
- Zip lock bags
- Tape
- Eye drops
- Baby wipes
- Super glue
- Safety pins

In section four, my main learnings were from the event planners that I interacted with. In addition, I also continued to look at the literature and resources. Both of those are outlined as key learnings in this chapter.

SECTION FIVE: KEY LEARNINGS & CONCLUSIONS

After completing this project, there were some major key learnings that showed as a theme between all the event planners. The first being how important organization is to ensure a smooth event planning process. Each planner was very adamant about how imperative “planning” is at each stage of the event. This includes creating an extremely meticulously detailed timeline for the event-day and making sure everyone involved with the event, from the clients to the vendors has access to the timeline. This is necessary to ensure all participating parties are on the same page. Different programs online can be a major aid to organizations to help create spreadsheets for timelines, contact information for vendors and guests, vendor and venue information, and budgeting.

The second was that the timeline for event creation to competition is relatively the same for each planner. Each planner preferred to begin planning a new event 18 months in advance and a preexisting event 8-12 months in advance. While each of them mentioned that this varied, these relative timelines provided the least amount of stress on both the planners and clients.

And lastly, many planners seem to have issues with the vendors that seem to be easily resolved with good communication. The main reason for this seemed to be that the planners only worked with specific vendors a couple of times, so they don't have the time to develop a personal relationship to make communication easier. This seems to lead to miscommunications between vendors and the planners on what expectations are. This problem can be hopefully eliminated by sending vendors the same event-day information the clients have access to so they understand the timeline of the event and what their roles are.

If I would do this again, I would change the fact that I did not reach out to many people from different cities. I only spoke with one person outside of Buffalo, but this person was still located in the north with a similar climate. If I had an experience again, I would speak to planners located in different parts of the country where they have different climates and would deal with different types of weather which I imagine would lead to different advice, especially for outdoor events. Also, their event seasons may be longer, and they may have different problem-solving techniques for weather related issues. Also, I would have reached out to people sooner to leave them more time to fit me into their schedule. That was challenging with this project because I had to wait until it was approved, before I could move forward with contacting event planners, leaving only about 6-8 weeks for the event planners to answer me, set up a meeting, and hold the meeting. Because of this, I didn't get to meet with as many people as I would have liked to in the beginning. About 2/3rds of the planners I reached out didn't get back to me. Which, in hindsight is fine, because if they aren't excited to share their knowledge, I would rather spend my time with planners who are. To help combat this, I could have reached out in a different way first which may have made it more likely that they would answer me or see my message. I could have also gone in person to some of the offices of people I was interested in chatting with, to see if that would create a better outcome for me as well.

Something I liked about what I did was, I liked that I felt very comfortable and confident in this role. I feel that with my current skill set, I was able to showcase that in the types of questions I was asking and was able to lead the meetings in a way that was

valuable to both myself and the planner. I think this showed itself, in the fact that I was offered work.

One shocking key learning I had during this experience was seeing how easy it was for me to use this method to get a job. Throughout this process I ended up with three job offers. And at the end of the process, I expected one of these offers. Over the past three years, I have been applying for jobs and have used my résumé and cover letters in this process. Although I feel that my résumé is strong for this point in my life, it is not strong enough to get me an interview. I am somebody that I think interviews well, since I am quite friendly and open up easily. After meeting with these planners, they seem to want to hire me without even seeing my résumé or cover letter and just based on my personality and the fact that I was interested in learning more about the field. It is shocking to me, because this is not how you typically go about getting a job, but it is what landed me a job and definitely an unexpected outcome of this experience. I think this could have to do with the fact that people who are hiring, love those who are excited to learn. In the situation, the planners had nothing to lose by letting me speak with them, and they were just happy to share their knowledge with somebody that was excited to learn and grow. Additionally, I wasn't nervous since I was not treating it like a job interview, and was much more relaxed and confident in myself. Finally, I ask good questions. I think the types of questions I ask played a role in this as well.

What I see myself doing next is using all this new knowledge I've learned, and applying it at work. This knowledge is incredibly helpful for any type of events related job as well as other jobs in creativity and leadership. I'm excited to utilize this wealth of

information in the coming months as I enter the professional workforce as an event planner.

I know that this project was successful because firstly, I received multiple job offers. This tells me that I did a good job in the way that I presented this project, as well as the questions I asked when meeting with different planners. I am proud of the way I came across, as a student and a leader since this resulted in multiple positive networking opportunities for myself. I also know this was a successful project because of the wealth of information I gained giving me the confidence I need moving forward. Additionally, I can judge the success of this project by the support my peers have given me through this process. Through listening to feedback, my peers are proud of the knowledge I've gained and also the connections I've made, but most of all the fact that I am now working in the field that I was and am so excited to enter.

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