CORRELATIONS
PROFESSIONAL
TRAINING & DEVELOPMENT

www.correlationsllc.com

Event Planning Renewal

Correlations Event Program
2021-2022 Training Manual

Key Renewal Points

What we have lined up for your renewal

1. Added Glossary Terms
2. Event Planning Post-Pandemic
3. Event Planning Basics
4. Digital Event Planning
5. Risk Management
6. Event Marketing
7. Contracts
8. Venue Planning
9. Planning for Disabilities
10. Booking Speakers
11. Travel Considerations
12. Food & Beverages Post-COVID

03

Added Glossary Terms

The world of event planning is constantly changing and our vocabulary (industry jargon) is evolving.

Please add these terms to your mental rolodex when it comes to event planning.

- Carnet
- Collateral
- Colloquium
- Fresnel Lights
- Leko Lights
- Pacing
- Peripheral Block
- Reasonable Accommodation

Added Glossary Terms

Carnet

Allows a party to temporarily send merchandise into a country for such purposes as display and demonstration without being responsible for paying duties.

Collateral

A collective term for material distributed to attendees at registration, including badges, lanyards, tote bags, agenda, and other materials.

A common use for the word collateral, outside of the world of event planning, are assets that can be pledged to guarantee a loan.

Added Glossary Terms

Colloquium

An informal meeting for the purpose of discussion, usually of an academic or research nature, to ascertain areas of mutual interest through exchange of ideas.

Fresnel Lights

Soft beams with focused lights for visual production. The lens in the front of the bulb can be moved back or forth, which either spreads out or narrows the light beam to focus on the speaker or the entire room.

Leko Lights

Focused light beams for visual production. Used for stage production and hybrid events when focused on one speaker or entertainer.

Added Glossary Terms

Pacing

Refers to the scheduling of activities within an itinerary or meeting program to make for a realistic balance of travel time, educational programming, social events, tours, free time, and rest. It also refers to the rate at which transportation is operating, which includes turnaround time between stops.

Peripheral Block

An estimate of room nights based on past events. It is important to track your peripheral block with the actual room nights that were used for historical tracking purposes. It will help offset attrition charges against the event-contracted block.

Reasonable Accommodation

Any provision that aids the participation of a person with a disability, as long as it does not create a hazard to others, a major disruption in business or an undue financial or administrative burden.

Event Planning Post-COVID

Event Planners

are a special breed. Our hearts and voices were silenced during the pandemic. We were the first to shut down our events for the safety of the world and we are the last to reopen because health and safety remain a priority to us.

Will online attendance increase or decrease?

We stopped planning in-person events at a "neck-breaking" pace and now we are expected to return to in-person events as if nothing ever happened. But a pandemic happened that rocked our world. We shifted to a digital world but the world quickly realized that you cannot replace real life events with digital events!

Online attendance is here to stay, it is not expected to increase or decrease but it will remain an alternative. However, in-person events will quickly ramp back up, faster than ever. We must transition to provide digital and in-person solutions for our clients and employers as our new normal.

3 Main Reasons: People will attend events Post-COVID

08

1.INFORMATION

During the pandemic, there was a spike in online training and people were eager to consume information and education. Your events should serve a purpose of providing information.

2. NETWORKING

Multiple efforts were created for people to network online with chat boxes and online communities designed for specific events. But we are not robots. As human beings, we crave networking and making physical connections.

3. RECREATION

More than ever, people are seeking to maximize the quality of their life with entertainment, travel, and health and wellness activities from 5K races, hiking, tennis, yoga, meditation, golf, and retreats.

Our New Event Commandments

Strategic Distance.

The CDC no longer requires social distancing but it is a good idea to maintain distance when possible. Instead of sitting 8 people at a banquet table, sit 4-6 people.

Keep it conversational.

When selecting speakers, choose speakers that are skilled with storytelling and interacting with the audience. People prefer conversations rather than presentations.

Provide value.

When planning events constantly ask yourself, "What is the participant getting from this? Give value with information, networking, and recreation.

Find a fresh angle.

Due to COVID, event planners are required to be more creative with “Design Thinking.” Design Thinking has three phases of Inspiration, Ideation, and Implementation.

Know the 3 Education Laws.

1.*Law of Effect*—people learn best in pleasant surroundings.
2.*Law of Exercise*—people tend to learn better by doing rather than by listening.
3.*Law of Readiness*—people tend to value motivation to do the right thing.

Create a Needs Analysis.

Event planners are being asked to create events to bring employees up to date with current technology. The most effective way to accomplish this objective is called a “Needs Analysis.”

NEEDS ANALYSIS

Determine the problems and needs for your events.

01	PROBLEM	Identify a problem or gap that needs to be solved and filled.
02	RESEARCH	Research potential solutions or speakers to solve the problem.
03	ANALYZE	Analyze quantitative and qualitative research to determine what will best solve the problem for your audience.
04	INFORM	Use evidence based solutions, speakers, trainers, and authors to inform the audience about the solutions.
05	CONCLUSION	Interpret the results from your events and write your conclusion.

Event Planning Basics

BUDGET. AGENDA. TIMELINE. (B.A.T.)

For the Correlations Certified Event Planner Program, we believe each event plan should consist of a Budget, Agenda, and Timeline.

After determining the goals and objectives for the event, the best starting point for planning a successful event begins with a budget.

There are five types of budgets:

1. **Functional Income Budget**
2. **Break-Even Budget**
3. **Functional Expense Budget**
4. **Comprehensive Budget**
5. **Zero-Based Budget**

BUDGET

The 5 Types of Event Budgets

01 FUNCTIONAL INCOME BUDGET

A fixed amount readily available for the expenses of an event.

02 BREAK-EVEN BUDGET

A specific amount an event must produce before it can clear a profit.

03 FUNCTIONAL EXPENSE BUDGET

Explains the purpose of an expense by category ranging from supplies, catering, transportation, etc.

04 COMPREHENSIVE BUDGET

Includes a projection of rrevenue with fixed and variable expenses.

05 ZERO-BASED BUDGET

Events without a budget (if there is no financial history in relation to the event) require research to create a feasible budget.

Event Planning Basics

BUDGET TIPS

- To ensure your event revenue covers all expected costs for your event, you should plan the functional income and functional expense budget. Determine how much is coming in versus going out.

- Establishing registration fees is accomplished by creating a break-even budget. Example: The event cost is $5,000 with 50 participants paying a $100 registration fee is a break-even budget.

TIMELINE

- A timeline is also considered a critical path. It is a chain of activities that must begin on time and stay on track to achieve project milestones and ultimately execute the event on time.

VOLUNTEERS

- When working on a corporate or non-profit event, please make sure the event is shaped to support its mission and strategy. Align your events to meet the expectations of the customers, stakeholders, and the overall values of the company.

- When you are seeking to hire or get volunteers for an event, please post a job opening at least two months in advance to make sure you have enough hands to help you.

- When planning to have volunteers at your events, the volunteer coordinator should plan for 30% overage to cover no-shows or poor performance.

EMOTIONAL CURRENCY

75%

of participants are likely to remember, share on social media, and refer a friend or colleague to attend events with emotional currency.

Emotional Currency is the “feel-good” factor of an event. From the entrance, greeting, décor, and favors; we must make sure participants feel good during our events.

Tangible emotional currency in favor bags are considered must-have essentials that people are most likely to share on social media and use during or after an event:

1.Insulated water bottles
2.Phone chargers
3.Wireless earbuds
4. Wireless charging pad
5.Pedicure set
6.Hand sanitizer
7. Candles
8.Notebooks and ink pens
9. Bottle of wine
10. Essential oils

Digital Event Planning

Our new normal

EVENT MANAGEMENT SOFTWARE FOR VIRTUAL, HYBRID, LIVE STREAMING

As we navigate through the world of events, we must create a seamless process to manage in-person and virtual events. Here is a list of the top 10 Event Management Software Companies.

- **CVENT**
- **EVENTBRITE**
- **SOCIO**
- **WRIKE**
- **EVENTMOBI**
- **MONDAY**
- **ATTENDIFY**
- **PERSONIFY**
- **EVENTZILLA**
- **TRIPLESEAT**

DIGITAL EVENT PLANNING

5 STEPS TO PLAN A DIGITAL EVENT

01 DEFINE A GOAL

What kind of experience do you hope to deliver? What are your revenue goals?

02 SELECT A DATE & TIME

What is the best time for the event? Take time zones into consideration.

03 CHOOSE DIGITAL PLATFORM(S)

Webinar, Social Livestreams, Virtual, Chatrooms, Hybrid.

04 PROMOTE

Market the key selling points of a noteworthy speaker, skill sharing, networking, and more.

05 PREPARE FOR TECH TROUBLES

Prepare backups of visuals, pre-record video presentations, and assign moderators.

MOST POPULAR DIGITAL PLATFORMS

LIVE TWEETING

- DISCORD
- REDDIT
- SLACK

SOCIAL STORIES

- INSTAGRAM STORIES
- FACEBOOK STORIES
- TIKTOK
- SNAPCHAT

WEBINARS

- 6CONNEX
- CROWDCAST
- DEMIO
- LIVESTORM
- WEBINARNINJA
- ZOOM
- MICROSOFT TEAMS

SOCIAL LIVE STREAMS

- INSTAGRAM LIVE
- FACEBOOK LIVE
- LINKEDIN LIVE
- TIKTOK
- TWITTER LIVE
- YOUTUBE LIVESTREAM

CONFERENCES & NETWORKING

- 6CONNEX
- BRELLA
- BIGMARKER
- HEYSUMMIT
- HOPIN
- RUNTHEWORLD
- VFAIRS

Event Marketing

THE 6 OBJECTIVES OF YOUR EVENT WEBSITE

It is more critical than ever to have a website dedicated for your events. The 6 objectives of a website:

1.Increase attendance
2.Optimize data flow
3.Sell more booth space and sponsorships
4.Attract speakers
5.Generate press coverage
6.Create new revenue opportunities

A WEBSITE INCREASES REVENUE

A website can be used to generate additional revenue for events by providing online sponsorship opportunities, delivering online educational programs, selling books and audio resources, and producing pay-per-view opportunities.

BUILD AN ONLINE COMMUNITY

When possible, it is a good idea to build an online community for your events to enable participants to communicate through online channels to increase the chances that they will be interested in meeting each other at the event.

ENGAGE 3 FORMS OF DIRECT MARKETING

To maximize guest attendance, a minimum of three forms of direct marketing will provide the best results. Direct marketing includes 1) mailed invitations, 2) text messages, and 3) emails.

Event Marketing

RISK MANAGEMENT

MAKE RISK MANAGEMENT A PRIORITY

Risk Management must be at the forefront of your event planning. Consider implementing a risk assessment and risk identification plan. It should include step-by-step instructions. Please include the following four steps:

1.Identify Risks (SWOT Analysis)
2.Analyze the Risks
3.Develop a Risk Management Plan
4.Develop a Crisis Response Plan

CREATE A SWOT ANALYSIS

It is best to start a risk management plan with a SWOT Analysis. It should include the strengths, weaknesses, opportunities, and threats.

Correlations Event
PROGRAM

SWOT ANALYSIS

RISK MANAGEMENT

S	STRENGTHS	Identify the strengths. We have a creative team including executives and business consultants.
W	WEAKNESSES	Identify the weaknesses. Our marketing team is strained with existing projects and we lack technical skills and resources.
O	OPPORTUNITIES	Identify the opportunities. The event can produce a significant revenue increase.
T	THREATS	Identify the threats. Travel costs could potentially be high and undermine the revenue increase.

RISK MANAGEMENT

THE 3 P's of RISK MANAGEMENT

For an effective risk management plan, be sure to include the 3 P’s:

1. **Protect**
2. **Prepare**
3. **Process**

PROTECT the participants, stakeholders, environments, and host organizations.

PREPARE for incidents and emergencies.

Develop a **PROCESS** for risk identification, assessment, management, and evaluate improvements for each.

CONTRACTS

- A contract does not need to be a formal written document. It can be an oral agreement, but different recollections lead to disputes. It is best for a contract to include terms and conditions that are intended to protect the interests of both parties.

- A valid contract should include:
  - A consideration
  - An offer
  - A cancellation policy
  - An acceptance

- During the pandemic, event planners were navigating through ***force majeure*** clauses in contracts. A Force Majeure is a circumstance in which a contractual obligation is excused due to a factor not within the control of either party that makes performance impossible or commercially impractical.

- When writing a contract, a waiver of subrogation will help to avoid a lawsuit. A waiver of subrogation is a provision that prevents the insurance company from suing your clients or employers.

VENUE PLANNING

- Convention centers and conference centers have resumed bookings for post-pandemic events. There is a distinct difference between them.

- A convention center is a public assembly facility, often owned by a city or government, it has exhibit halls, ballrooms, large banquet rooms, and small meeting spaces. A conference center provides a dedicated environment for meetings but usually does not have large exhibit halls or on-site restaurants.

When securing a venue for an event, consider the following:

- Full-service
- Airport proximity
- Star ranking and reviews
- On-Site restaurants
- Resort fees
- Wi-Fi streaming capability (bandwidth) and cost

PLANNING FOR DISABILITIES

When planning events, be sure to plan for individuals with disabilities. The following are the purposes of the Americans with Disabilities Act (ADA):

1. To provide a clear and comprehensive national mandate for elimination of discrimination against individuals with disabilities.
2. To provide clear, strong, consistent enforceable standards addressing discrimination against individuals with disabilities.
3. To ensure the federal government plays a central role in enforcing the standards on behalf of individuals with disabilities.

- Information on attendees' disabilities can best be obtained with registration forms. It is common to see a line for special dietary needs, but the form can be modified to request all special needs. Special needs must be provided in advance to help ensure the best experiences for attendees. It can prevent on-the-spot reactions by the host and staff.

- A reasonable accommodation is defined as "Any provision that aids the participation of a person with a disability, as long as it does not create a hazard to others, a major disruption in business or an undue financial or administrative burden."

Planning for Disabilities

PARKING

At least 4% of parking spaces should be designated for people with disabilities. Before booking a venue, check the slope of the ADA ramps (how much rise per how much run), which should be 1 inch of rise for every 12 inches.

DOORWAYS

The width of the doorways, hallways, and clearance on one side of a bed to allow wheelchairs to pass through is 32 inches.

RESTROOMS

Restroom toilets should not exceed the maximum flush height of 44 inches.

BOOKING SPEAKERS

- The first step for selecting a speaker is taking the time to look at the educational objectives for the event.
- You should start searching for speakers as soon as the event date is set.
- A facilitator and online moderator are critical for virtual and hybrid meetings to encourage participation and enhance the value of the presentation for everyone. They play a huge factor with getting people to participate in online polls, breakout sessions, and troubleshooting tech issues.

When booking a speaker, a letter of agreement should include the following:

1. Travel arrangements
2. Date, time, and location
3. Payment terms/fees
4. Cancellation policies
5. Procedures
6. A/V requirements
7. Legal implications
8. Whether you want the speaker to attend social events

Travel

FLIGHT DISCOUNTS

A minimum of 10 travelers are needed to secure a discounted group airfare.

GROUND TRANSPORTATION

When selecting a ground transportation company, the following should be considered:

1.Reputation
2.References
3.Number, size, type, condition, and availability of vehicles

Food & Beverages Post-COVID

POST-COVID TIPS

Certified Event Planners are being encouraged to refrain from offering a Buffet Service. Instead, please consider offering a Plated Service where attendees pre-select meals that will be plated in advance.

French Service also minimizes touch points and contact with food. French Service is when food items are prepared and served tableside.

"Quick service restaurant" model is an alternative solution with a contactless ordering method and a designated pick-up area.

If having a dessert table, treats and fruit should be individually packaged; but if possible, please plate desserts for guests to minimize touch points.

Food & Beverages Post-COVID

POST-COVID TIPS

A catering department or facility will typically prepare 3-5% above your guarantee.

Please avoid passed hors d'oeuvres or beverages, they pose health risks.

One cocktail server is recommended for every 50 attendees and one wine steward for every 5 tables where wine service accompanies dinner.

Instead of a line for a bartender, a cocktail server can take orders and bring them directly to the table(s) to minimize contact and touch points.

Correlations Event
PROGRAM

Congratulations

You have successfully reviewed the renewal training manual. Please complete and submit your assessment to maintain your event certification. If you have not received your assessment via email, please request it by sending an email to info@correlationsllc.com.

Thank you for choosing Correlations for your formal event training.

www.correlationsllc.com