

# CHAPTER 10

## *The Basics of Planning*

You have successfully completed the course, established your company and started advertising. Your phone is ringing...now what?!

When your efforts to launch your business start to pay off, it is an exhilarating and nerve-wracking time. Remind yourself that you are educated, qualified and prepared. Receive the prospect's telephone call with confidence and professionalism. As detailed in Chapter 5, make plans to meet with the prospective client after qualifying that you have a potential good fit – personalities, budget, etc.

Sign a contract with the client and secure your retainer. Do NOT commence any work on the bride's wedding until you have both the agreement and deposit in your possession. Between one-third and one-half of your fee is recommended as a retainer with your final payment due at least three weeks prior to the wedding date. You establish the payment structure based on your contract.

### **Budgets – Design and Management**

Weddings are costly events. Current statistics can be found at Cost of Wedding's The Wedding Report.com. It is not uncommon to meet with clients or potential clients and discover that the client has no realistic idea of the cost of a wedding. Traditionally, in the Anglo-American culture, the bride's family pays the majority of the wedding expenses. Today, with the delay of marriage until the age 30 or later, many couples are well established in their careers and are now paying for their own weddings. Whatever the arrangement, the amount of expenditure on

modern weddings usually requires a budget. You must have a budget before any other work begins, and the budget should be based on realistic costs. When preparing a budget there are some basic questions that should be answered before beginning. First, who will be financially responsible for the wedding? Second, what is the overall amount that the couple is willing to spend? Sometimes, a client will claim they have no budget in mind. This is when the planner should at least assign an “estimated” amount to use as a base when building the budget. It can always be adjusted as the planning progresses. A good place to start is to get an estimate of the number of guests expected to attend, bridal party members and other pertinent information that will affect the budget. And finally, ask if there any items that the couple would like to exclude from the budget, such as her wedding attire.

If you have interviewed your client carefully, you have heard them describe their vision of the wedding day. They have probably told you the type of photography they want, and estimated the number of guests to be invited to the wedding.

Based on the information you have from the couple, you should be able to determine their priorities for the wedding. Is the food the most important? The photographs? The flowers? The couple’s priorities are some of the line items to which you may want to allocate additional funds.

All of this information will guide you in suggesting vendors in the appropriate price range and understanding the possible trade-offs that may be necessary in reaching a realistic yet acceptable budget.

Once the budget is developed, review it with the couple, and their parents, as well as any other people that will be contributing. Complete agreement on the budget is essential and will set the foundation for all of your planning efforts.

It is wise to always begin with the reception, which is usually 50-60% of the entire budget. Remember that the client will most likely not be familiar with

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industry lingo and going over reception details may require explaining some basic terms such as:

- Food/beverage minimum
- Room rental fee
- Tax
- Service charge
- Gratuity
- Bar/beverage
- Security, if applicable

There may be a ceremony fee even if the ceremony and reception are at the same venue so be sure to designate a separate ceremony category for all the items that fall under this heading.

- Ceremony site rental fee
- Minister
- Wedding coordinator (some churches require their own wedding coordinator at a fee)
- Ceremony music (some churches require that you use their organist for a fee)

Because these are large budget items, be sure to start with them first. Next, continue with the following budget categories, taking care to be mindful of the sub-categories.

### Attire and Beauty

- Bridal gown
  - o Undergarments
  - o Veil
  - o Shoes
  - o Jewelry
- Tuxedo



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- Hair/Make-up

- o Wedding day, bridal portrait and trial run

### Bakery

- Bride's cake
- Groom's cake
- Cake stands
- Delivery fee

### Entertainment

- Band
- Disc Jockey
- Pre-function entertainment
- After Party

### Floral/Décor

- Ceremony flowers
- Personal flowers
- Reception flowers
- Lighting
- Delivery fee

### Gifts

- Bride and groom's gifts to each other
- Parents
- Attendants
- Guest favors
- Guest gift baskets

### Lodging

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- Wedding night

### Rentals

- Linen
- Tables/chairs
- China, chargers, etc.
- Delivery fee

### Photographer

- Wedding day coverage
- Engagement session
- Bridal portrait session
- Albums/other products (specialty prints, etc.)

### Stationery

- Save-the-dates
- Invitations
- Programs
- Escort/place cards
- Menus
- Signage
- Postage
- Thank-you notes

### Transportation

- Hourly
- Transfer

### Videography

- Wedding coverage

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- Photo montage
- Wedding day highlights

### Wedding accessories

- Champagne flutes
- Cake serving set
- Unity candle

These are just some of the more popular main categories to consider when preparing a budget. With each client and their specific preferences and needs, you may add additional categories such as tents, greenery, etc. Be prepared to educate them on the average costs for all of the budget categories. This will assist you in allocating the funds according to their vision and justifying the amounts. The key is open communication with your client as the budget will change and evolve as you progress in the planning process.

### **Designing the Wedding**

Once you establish a budget that both you and the client agree upon, it is time for some fun. Now that you have a solid idea of the couple's vision for their wedding, you need to work on developing the theme or color scheme, which dictate the formality of their wedding.

#### Themes

A popular trend is to design a wedding with a theme. The theme can be almost anything – a sport, hobby, special interest, color, season, etc. There are musical themes, outdoor themes, holiday themes and historical themes. A theme can even be centered on a person (example: an Elvis Presley theme), a single item (example: a motorcycle) or a place (example: a Las Vegas or Disney wedding). The most successful weddings of this type carry the theme throughout the entire event. It begins with incorporation of the theme into such early items as a “save-

the-date” notice and continues to be integrated into all facets of the wedding.

Invitations, colors, musical choices, décor, food choices, favors and cocktails can all support a particular theme.

It is relatively easy for the wedding planner to research a theme and find theme-related items using the Internet and talking with vendors. Probably the most difficult theme to carry out is one that relies on using a very specific color or shade that is not readily available in fabric or ribbon.

Examples of recent trends in wedding design can be found in the appendix.

### **Creating the Planning Timeline**

Today, many clients are full-time working professionals. They have very limited time to meet with you and the vendors. Once you have contracted a client, it is important to lay out the next months of planning. Communication is a key component between you and the client, and you must understand their needs prior to planning. The expected level of involvement from you and the level of detail to complete the planning are important components of creating the wedding timeline.

The planning timeline is a schedule of planning activity that covers from the time you contract with the client until the date of the wedding. The format of the wedding timeline typically is a checklist of all essential tasks broken down by each month; as each item is completed, it should be recorded on the timeline.

The deadline for each task will depend on the time it takes to accomplish the task and also whether or not it must be completed before other necessary tasks can be scheduled.

For example, the style of an invitation must be selected before it can be ordered. Custom invitations can require up to four weeks for delivery, and invitations are to be mailed out six to eight weeks before the wedding. If calligraphy is to be done, another two weeks must be allowed prior to mailing. Taking all of this into



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consideration, invitations must be chosen and ordered three to four months prior to the date of the wedding. The task “Order Invitations” would be placed on the wedding timeline at a position about four months prior to the wedding.

The timeline should be reviewed at every client meeting as it catalogs tasks critical to the planning process. Some of these crucial tasks include:

- Preparing a budget
- Selection of ceremony and reception sites
- Creation of the guest list
- Selection of hotel accommodations
- Vendor selection
- Transportation
- Apparel selections
- Ordering rings
- Engagement portrait
- Invitation and calligraphy
- Men’s apparel
- Rehearsal dinner arrangements
- Menus
- Floral and linens
- Programs
- Gifts and favors
- Securing the marriage license

### **The Details – the Planner’s Role**

During the planning months, your role as the planner is just that: BE THE PLANNER. Keep the client informed of the planning checklist and most importantly, keep them informed of the budget, especially if you were contracted to attend to this detail.

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Introduce yourself to any vendors the client may have already contracted. Locate all additional vendors based on availability and budget. Give the client options of two or three vendors within their price range available in each category. If the client has hired you for full service, make sure that you attend the vendor meetings. Either make the appointment according to your availability or let the client make the appointments if this is not a service you offer.

You will create a client file and keep it organized with vendor contracts and correspondence between you, the client and vendors. Whether you attend the vendor appointments or send the couple to the meeting alone, reviewing the contract is an essential part of your planner role. Make sure all of the details outlined in Chapter 8 are covered in each agreement. You will become very familiar with the many contracts from the vendors. All clients want the best deal possible and will look to you to guide them in the best direction for the budget. Be sure to review any contract before it is signed.

### **Final Countdown - the Wedding Week Schedule**

Schedules are necessary to ensure the wedding weekend goes smoothly. About six to eight weeks prior to the event, meet with your client to discuss how they want their evening to flow. Take meticulous notes so that you are able to develop your schedule for the day of the wedding. Create the draft schedule about a month to six weeks prior to the wedding so that there is time to finalize it with all vendors and get approval from the couple. Important items for the schedule:

- Ceremony and reception location and contact number
- Essential phone numbers – the couple and you
- Essential times
- Tuxedo pick-up
- Bridesmaids luncheon
- Tee times for golf for the gentlemen
- Rehearsal time

- Rehearsal dinner time and location

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- Hair/make-up time and location
- Pre-wedding photos for the wedding party
- Transportation arrangements
- Plans at the conclusion of the reception

All of these specific details are necessary to include on the schedule. Ask that the couple e-mail it to their family and friends. Depending on the service level you are providing the client, you may be responsible for sending out the agendas to the family and wedding party.

Add in the things you will be responsible to do (time you will arrive, etc.). It is up to you to contact the ceremony and reception sites to find out what time their facilities will be available for the vendors to arrive for set-up.

There should be a separate agenda for the vendors. Be sure the vendors know where the ceremony and reception sites are located as well as the load-in areas. If you have not sent the agenda to the vendors by the Monday before the wedding they will begin calling the client. If for some reason there will be any delay on this, contact the vendors yourself so they will not bother your clients. Your job is to alleviate stress for the client, not create it for them.

During the week of the wedding, be sure every last task has been completed by the responsible party. The day before the wedding, attend the rehearsal. Arrive 20-30 minutes before the rehearsal is scheduled. Be sure to introduce yourself to the wedding party and parents if you have not already met them. Tell them your purpose for being at the ceremony and reception is to make certain that everyone in the family is able to enjoy the event. Direct the rehearsal as outlined in Chapter 12 if you are charged with doing so; otherwise, defer to the officiant and be available to assist or supplement as needed.

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On the wedding day, arrive 30 minutes to one hour before vendors are scheduled to arrive. Be sure to be at the ceremony site before the couple arrives, or if for some reason you are unable to be there please let them know. One reason for not being at the ceremony site prior to the client might be that you are tending to something really important at the reception site. The couple should never know if there are any problems; just fix them as best you can. In the event money is involved, contact either the mother or father of the bride before you spend any money that you expect to be reimbursed.

Above all – NEVER LET THEM SEE YOU SWEAT!