SA Innovation Summit

Planning and Logistics Training Module

SAIS II
• 10 steps to get started
• RECAP:
  • Achieving your objectives
  • Determining your value proposition
  • Identifying your audience
  • Confirming your platforms
• Starting your planning
• Creating your event outline
• Aligning your journeys with your project activities
• Drilling down to the detail
• Using tools to assist you
• The importance of Project Meetings
• Templates and examples
  • Project Plan Template in Excel
  • Event Checklist
  • Using an Event Manual
  • Resource plan
• Lessons learnt
• Questions and Answers
10 steps to get you started

- Develop Event Goal and Objectives
- Organise your Team
- Set a Date
- Brand Your Event
- Identify and Establish Partnerships & Sponsors
- Determine Administrative Processes
- Create a Master Plan
- Envisage each journey
- Create a Marketing and Communications Plan
- Establish a Budget
- Determine Evaluation Process
- Analyse results and Report
ACHIEVING YOUR OBJECTIVE

- Why are you arranging the event?
- What results do you need to achieve to meet your objective?
- How will you measure your results?
WHAT VALUE ARE YOU BRINGING?

- What will delegates gain from attending?
- What do they want/need?
- What makes you different from other events?
- How will the event benefit them?
WHO IS YOUR AUDIENCE?

- Who should you target to bring the value you offer?
- Who will be interested in what you offer?
- Who needs the platform you are creating?
- How do you reach this audience?
WHAT PLATFORMS DO YOU NEED?

- How will your ideal audience interact and get optimal benefit?
- In what formats are interaction presented?
- Who will participate in each platform?
“A goal without a plan is just a wish.”

– Antoine de Sant-Exupery
1. Choose a tool to help you. Excel is a good start, but you might need an online tool that allows real-time planning

2. Create a template that outlines your event’s main activities (Headings - what, who, when) – also refer to your checklist

3. Envisage the various journeys that will take place and identify the activities that will have to play out around your journeys

4. Break down each activity into more detail (e.g. on a Excel spreadsheet)

5. Capture detail in a Project Plan and start assigning resources, timelines and milestones
### Creating Your Event Outline

- **What**
- **Who**
- **When**

Create a simple 3-column breakdown:

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
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</table>
CREATING YOUR EVENT OUTLINE

- **What**
- **Who**
- **When**

Each of the “what’s” will relate to one of your identified journeys

<table>
<thead>
<tr>
<th>What</th>
<th>Description</th>
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<tbody>
<tr>
<td>Project Setup</td>
<td>Email addresses, shared drive, signatures, stationary etc.</td>
</tr>
<tr>
<td>Venue Management</td>
<td>Floorplans, load schedules, bookings, licencing, permits, insurance, etc.</td>
</tr>
<tr>
<td>Programme Management</td>
<td>Programme structure, start end times, dates etc.</td>
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<tr>
<td>Speaker Journey Management</td>
<td>Online speaking applications, keynote speakers, registration, speaker lounge, presentation uploads, programme updates, profiling, marketing</td>
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<tr>
<td>Event Management</td>
<td>Identifying suppliers, production, décor, AV, furniture</td>
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<tr>
<td>Partner/Sponsor management</td>
<td>Sales material, sponsorship opportunities, meetings, etc.</td>
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<tr>
<td>Catering Management</td>
<td>Vouchers, suppliers, setup requirements, numbers, coffee, tea, water, bars</td>
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<tr>
<td>Marketing Management</td>
<td>Branding material, press releases, newsletters, social media, website, blogs, content</td>
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<tr>
<td>Communication Management</td>
<td>Internal and External with speakers, volunteers, delegates, suppliers, exhibitors etc.</td>
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<tr>
<td>Supplier Management</td>
<td>Quotes, contracts, invoices, deposits and payments</td>
</tr>
<tr>
<td>Volunteer Management</td>
<td>Recruitment, building teams, developing leaders, rewards, accommodation, transport, meals, branded clothing</td>
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<tr>
<td>Reporting Management</td>
<td>Database management, data capture, analysis, reporting</td>
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</tbody>
</table>
CREATING YOUR EVENT OUTLINE

- What
- Who
- When

Choose project coordinators according to their skills and experience. Building a strong, cohesive team is crucial!

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
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<tr>
<td>Project Setup</td>
<td>• Identify what resources you have available.</td>
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<tr>
<td>Venue Management</td>
<td>• Indicate which resources you require and align with existing talent or expertise.</td>
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<tr>
<td>Programme Management</td>
<td>• Can you use volunteers?</td>
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<tr>
<td>Speaker Journey Management</td>
<td>• Should you outsource?</td>
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<tr>
<td>Event Management</td>
<td>• Do you need to appoint?</td>
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<tr>
<td>Partner/Sponsor management</td>
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<td>Reporting Management</td>
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Once you have your resources assigned, brainstorm the next level of detail in each of their responsible areas with them.

This is best done on an individual level.

Your key resources can decide whether they need further support and can then bring in a next level of responsibility build around activities.
## CREATING YOUR EVENT OUTLINE

### - What
### - Who
### - When

Develop a shared understanding and responsibility for the project plan. Team members cannot work in silos.

### Milestones

- Bring your project team together and discuss the key milestones that need to be reached.
- Decide on critical deadlines.
- Ensure the whole team is aware of these and that there is a mutual understanding around delays.
- Develop a plan to track and react to delays.
- Implement a meeting schedule where high level milestones are discussed.

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<th>What</th>
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<td>Reporting Management</td>
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ALIGNING YOUR JOURNEYS WITH YOUR ACTIVITIES

• Once you have the main areas of activities required outlined, you need to think again about the different journeys that will take place during each of the activities.

• Your journeys always need to inform the project plan.

• Visualise the journeys by going through it in a team.

• Now check your project plan and check that you have covered all the activities.
## Delegate Journey

I am a delegate:

1. **How will I be informed of the event?**
2. **What will I pay?**
3. **How do I register?**
4. **How do I get my ticket?**
5. **How do I know what is in the programme?**
6. **Where is the venue? Where do I park? Where do I go?**
7. **What will I eat / drink?**
8. **Where can I get information?**
9. **Who will they ask for information?**
10. **How do I charge my phone?**
11. **How can I give feedback?**

## Project Activities

- Newsletter, social media, flyers, emails etc.
- Ticket price table, specials, early birds, complementary tickets
- Online registration platform, landing page, website link
- Weekly emails, newsletter, website
- Hotel accommodation, flights, arrival desk at the airport, shuttles etc.
- Reception desk, signage, event app.
- Welcome drinks, coffee, tea upon arrival
- Information desk, signage, event app, volunteers
- Signage, floor map, printed programme, event app etc.
- Polling, surveys, contact email addresses
Now that you have mapped the various journeys, you can update your detailed project plan.
Building your Project Plan

**Project Activities**

- Newsletter, social media, flyers, emails etc.
- Ticket price table, specials, early birds, complementary tickets
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**To Do’s**

- Send out monthly newsletter.
- Design and print flyers
- Segment database and send out personalised email invitations
CHOOSING A PROJECT MANAGEMENT TOOL

## Event Management Software

Compare product features and ratings to find the right Event Management Software for your organization.

<table>
<thead>
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<th>Product</th>
<th>Deployment</th>
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[Click here for comparison]
The more complex your event, the bigger the need for an event manual.

The Event Manual is a key tool that provides guidance and reference for all principal staff and advisors working on the event itself. It recounts final decisions taken by the project's key planners on all operational aspects of the event and provides a practical operational guide.
Event Budget

An essential evil!

- Start the budgeting process early
- Update your budget regularly
- Get more than one quote from suppliers
- Plan for the expected unexpected
- Identify additional sources for revenue
- Excel in Excel!
OVERVIEW OF TEMPLATES AND MONDAY.COM DEMO

- Project Plan in Excel
- Resource Plan
- Checklist
- Event Manual
- Event Budget
- Monday.com project management tool
QUESTIONS, ANSWERS AND EXPERIENCES!