HOW TO STREAMLINE YOUR EVENT PLANNING PROCESS

A GUIDE FOR BUSY EVENT PLANNERS
For event planners, time saving shortcuts that reduce workload are a god send. The challenge of course, is ensuring such time-savers don’t come at the expense of guest and presenter experience.

In this guide, we’ve gathered the best sanity-preserving methods to plan efficient, reduced time-investment events that deliver remarkable experiences.
HOW VENUE CHOICE IMPACTS YOUR TIME INVESTMENT

WHEN IT COMES TO STREAMLINING YOUR EVENT PLANNING PROCESS, IT ALL STARTS WITH YOUR VENUE.

Based on its features, the venue will largely determine the input required by you to bring the event to life. And that's why it's essential you know what to look for when assessing options (we'll discuss these in depth shortly). It can be the difference between an easy ride for you, or lots of unwanted extra stress.
WHAT TO LOOK FOR WHEN CHOOSING A VENUE

INVEST IN INCLUSIVE TECHNICAL SUPPORT AND AV

The best venues will offer technical support onsite to alleviate struggles with projectors, laptops and PowerPoint presentations. What’s more, your room will include necessities like internet, a presenter laptop, projector and speakers. Make sure to check with the venue if this service is included. Hefty hourly and equipment charges can be applied in some locations!

It’s smarter to pay a higher day delegate rate for inclusive tech support. The alternative is like saving money on low-cost plane ticket, only to be surprised with eye-watering baggage fees at the airport!
ASK YOUR VENUE ABOUT THEIR ORGANISATION PROCESS AND SUPPORT

WHEN BOOKING EVENT SPACE, YOU MAY FIND YOURSELF PLAYING EMAIL TENNIS WITH THE VENUE IF THERE IS AN ENDLESS SLEW OF PAPERWORK TO SIGN OFF. TO PROTECT YOUR TIME, IT’S WISE TO ENQUIRE ABOUT THEIR ORGANISATION PROCESS UPFRONT.

Your best bet is a venue that concentrates communications into fewer interactions. Also, ask how many contacts you will be dealing with. Again, the fewer the better. Where you have a dedicated person to ‘own’ your booking, dealings will be far simpler.

Ideally, choose a venue provider that offers a centralised booking support service who can manage your entire logistics. Services like multi-location event delivery, guest registration and onsite material handling are your best friend!
DO YOU NEED ‘OUT-OF-THE-ORDINARY’ SERVICES? PAY CLOSE ATTENTION TO YOUR QUOTE!

A GOOD VENUE WILL PROVIDE ADDITIONAL SERVICES AT NO EXTRA CHARGE.

For example, services like sourcing external quotes for floral, staging, linens, customised event setups or anything “out of the ordinary”. They will also manage the bump in and out for this. This would include arranging appropriate collection times, booking loading docks, onsite event management and more.

If you have detailed requirements, prioritising venues who offer such a service will significantly reduce your personal workload! The last thing you need is to be arranging more and more parties’ involvement.

THE HIDDEN COSTS OF NON-INCLUSIONS

Hidden extras and costs like tea and coffee, basic AV and Wi-Fi can quickly add up. After tallying up all your requirements, venues with an “all-inclusive” approach often work out to be much better value.

STREAMLINING YOUR VENUE SEARCH

Things to consider

1. Word of mouth or Google? Remember that reviews on any one site are based on someone’s personal experience. Always cross reference different opinions before deciding if the space is for you.

2. Try to book in a venue tour. This will give you a much better idea of how your event will roll out and assist you in deciding if the space is appropriate for your needs.

3. Prepare a venue checklist (or use our template on page 14) to ensure you find a venue that makes your life as easy.

PRO TIP:

Go ‘all-inclusive’ for ultimate ease and lower final cost per person
“IN STREAMLINED EVENT PLANNING, KNOWING YOUR BUDGET FROM THE OUTSET WILL SIGNIFICANTLY REDUCE TIME WASTAGE”
LOCK IN YOUR PREFERRED VENUE QUICKLY TO PREVENT ISSUES

YOU CAN RISK LOSING YOUR FAVOURITE VENUE IF YOU DO NOT CONFIRM THE BOOKING IN A TIMELY FASHION. WORST CASE, YOU MAY END UP WITH YOUR SECOND OR THIRD CHOICE, OR A SECOND PREFERENCE DATE.

Once you have decided on a venue, confirming the space as soon as possible will enable you to start the planning process.

Locking in the venue quickly means invitations can now be extended to guests, suppliers booked, and budgets confirmed. You can hand over the logistics to your chosen provider and get on with the rest of your job!

PRO TIP:

Keep in mind, many corporate venues’ peak times are Tuesday to Thursday. If your event dates fall mid-week, the earlier you confirm your venue the better.
CATERING: HOW TO REDUCE PLANNING STRESS WHILE MAINTAINING QUALITY

TAKING A GROUP OFF-SITE FOR A MEAL CAN BE DIFFICULT WHEN CONSIDERING ALL FACTORS. FROM A PLANNING PERSPECTIVE, IT ALL AMOUNTS TO GREATER TIME INVESTMENT FROM YOU.

Firstly, sourcing a restaurant that’s within budget, easy distance and suitable for varied tastes is a considerable task. Then there’s cost, travel to and from the venue and keeping to your timings.

In-house catering is often the simplest and most cost-effective solution for event dining.

A BETTER SOLUTION

Where the venue offers catering, it eases the pressure of trying to accommodate all guest preferences. Most venues will offer a range of catering options to suit all palates, budgets and allergies. At Cliftons for example, your dining experience is structured to remove any organisation on your end. All options are covered, from sophisticated boardroom dining to relaxed all-inclusive gourmet cuisine. Most dietary requirements are automatically catered for and you can easily amend your catering requirements prior to your event.
A WORD ON COMMUNICATION

MAKE SURE AS THE EVENT PLANNER YOU COMMUNICATE ALL REQUIREMENTS AS THEY BECOME APPARENT SO THE VENUE CAN QUOTE ACCORDINGLY!

Do you know some of your guests have special requirements? Advise the venue early so arrangements can be made well in advance. Do you need additional storage or registration services? Ask for a quote upfront. Communication works both ways. The more information the venue has, the more personalised service they can provide for you and your delegates.

A great venue will communicate with you quickly and transparently. All costs will be outlined upfront and services that are (or aren’t) included should be clearly noted.

PRO TIP:
Investing the time to brief your venue thoroughly upfront will reduce your time in the long run. It prevents the email and phone tennis that arises when you think of things over time.
THE CLIFTONS ‘ONE-TOUCH’ EVENT PLANNING APPROACH

ORGANISING AN EVENT WITH A VENUE DOESN’T HAVE TO BE PAINFUL. HERE’S HOW CLIFTONS STREAMLINE THE PROCESS.

1. Event idea formulated
   You have an event that needs planning

2. Book
   Jump on the phone, send Cliftons an email or go to the website or online Client Portal to request your booking

3. Confirm
   When you receive your confirmation email, follow the link to confirm your booking

4. Voila! Space is reserved
   Once you’ve confirmed, we allocate your space

5. Relax!
   Enjoy the time to get on with other priorities like organising your speaker, run sheet and presentation notes (or online shopping!)

6. Details Finalised
   1-2 weeks out, your dedicated event coordinator will contact you to confirm all event details like final numbers, room setup, course materials, services required and anything else you need.

7. Three days to go…
   Had any last-minute changes? Don’t stress! There’s still time to amend additional services (like catering) up to three days before the big day.

8. Morning of event
   You arrive at Cliftons to find all the heavy lifting has been taken care of! Guests have been greeted and directed, your room and tech are setup, and event materials are in place. Relax, grab a coffee and head to your room.

9. Throughout event
   Staff are on hand to help with anything you need during the day. Your delegates are served delicious food at meal times, with something for everyone. You’re looked after from start to finish.

Success!

And next time only gets easier…
Did you know, in the Cliftons Client Portal you can make event templates that are rolled out for future events? We can duplicate the same requirements for you each time, from one set of instructions. Simple!
PLANNING MULTIPLE EVENTS, MULTI-SITE EVENTS AND GLOBAL EVENTS

EVENT PLANNING CAN BE A HEADACHE AS IT IS. SO, WHEN YOU HAVE MULTIPLE EVENTS TO PLAN (POSSIBLY ACROSS MULTIPLE LOCATIONS), THINGS CAN QUICKLY BECOME A NIGHTMARE.

From finding several venues that meet your requirements to tireless communication and difficulties with time zones and languages, there is a lot to think about. Anything you can do to make the process more efficient is a no-brainer.

STREAMLINING BULK OR GLOBAL EVENT PLANNING

Advice from the Cliftons Global Event Solutions Team:

- Find venues that offer bulk bookings online
- Create email templates to speed up routine communications with venues
- If possible, find a trusted provider that can run your events in all your required locations (whether through their own venues or partnerships with affiliates)

Kate is a PA at an insurance firm. She has four events to organise for her boss over the next six months. One will be in her own city, but two will be interstate and one overseas!

She is stressed at the thought of all the separate arrangements she’ll need to make with the different venues. Not to mention organise attendance numbers, gather dietary requirements and prepare the run sheets.

Kate then discovers Cliftons can handle her entire event schedule in all sites (even overseas!). With advice from the booking team, she creates an event template that can be rolled out in all locations. She never knew it could be this simple!
MAXIMISE YOUR TIME WITH ONLINE BOOKING AND AMENDMENTS

WHEN A VENUE OFFERS AN ONLINE BOOKING SYSTEM, YOU CAN SAVE SERIOUS TIME, EFFORT AND STRESS ON BULK EVENT PLANNING.

At Cliftons, the Client Portal allows you to be independent when it comes to managing your event schedule. It’s one shared place for your business to manage events. If a team member is absent, colleagues can pick up their work with access to all event details and history. In the long term, that equates to serious hours of phone and email time saved!

DID YOU KNOW?

A SNAPSHOT OF WHAT YOU CAN DO ON THE CLIFTONS CLIENT PORTAL

- Book, update or cancel events in real time (individually or in bulk)
- See an itemised overview of your event and required equipment
- Reduce time organising recurring events with templates
- Track past and future events and generate reports
- Add delegate and instructor numbers
- Add requests and notes
- Attach run sheets, sign-in sheets, layouts, class lists and event materials for printing
- See an itemised overview of your event and required equipment

As the event date approaches, your event coordinator contacts you to confirm all details are correct for an accurate delivery!
# QUICK VENUE ASSESSMENT CHECKLIST

USE THIS CHECKLIST FOR EASE WHEN DETERMINING VENUES’ FEATURES AND PROCESSES

<table>
<thead>
<tr>
<th>VENUE SERVICES FOR EASY EVENT PLANNING</th>
<th>NOTES</th>
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<tbody>
<tr>
<td>Do they offer online booking tools?</td>
<td></td>
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<tr>
<td>Do they offer inclusive technical support and AV essentials?</td>
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<tr>
<td>Do they offer in-house catering and networking packages?</td>
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<tr>
<td>Do they offer complete event management (guest registration, bulk printing, bump-in, sourcing quotes for additional services )?</td>
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<tr>
<td>If hosting events in other locations – can they manage your entire event schedule locally/globally?</td>
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<td>Can they replicate multiple events from a single set of instructions/event template?</td>
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<tr>
<td>How flexible are they with last minute changes and special needs?</td>
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<tr>
<td>Is there an on-site event coordinator dedicated to managing your event? What is their process?</td>
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<tr>
<th>GENERAL ESSENTIALS</th>
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<tbody>
<tr>
<td>Is there easy access for any guests who may need assistance?</td>
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<tr>
<td>Is it centrally located with public transport and parking nearby?</td>
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<tr>
<td>Are there plenty of breakout spaces for your guests to relax and recharge?</td>
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<tr>
<td>Is there Wi-Fi and high speed internet connection available and what are the costs?</td>
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<tr>
<td>Are there device charging stations?</td>
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<tr>
<td>Is my data and company information secure?</td>
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<tr>
<td>Is exclusive use space available for sensitive or private company meetings?</td>
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<tr>
<th>ANYTHING ELSE? ADD MORE REQUIREMENTS BELOW</th>
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