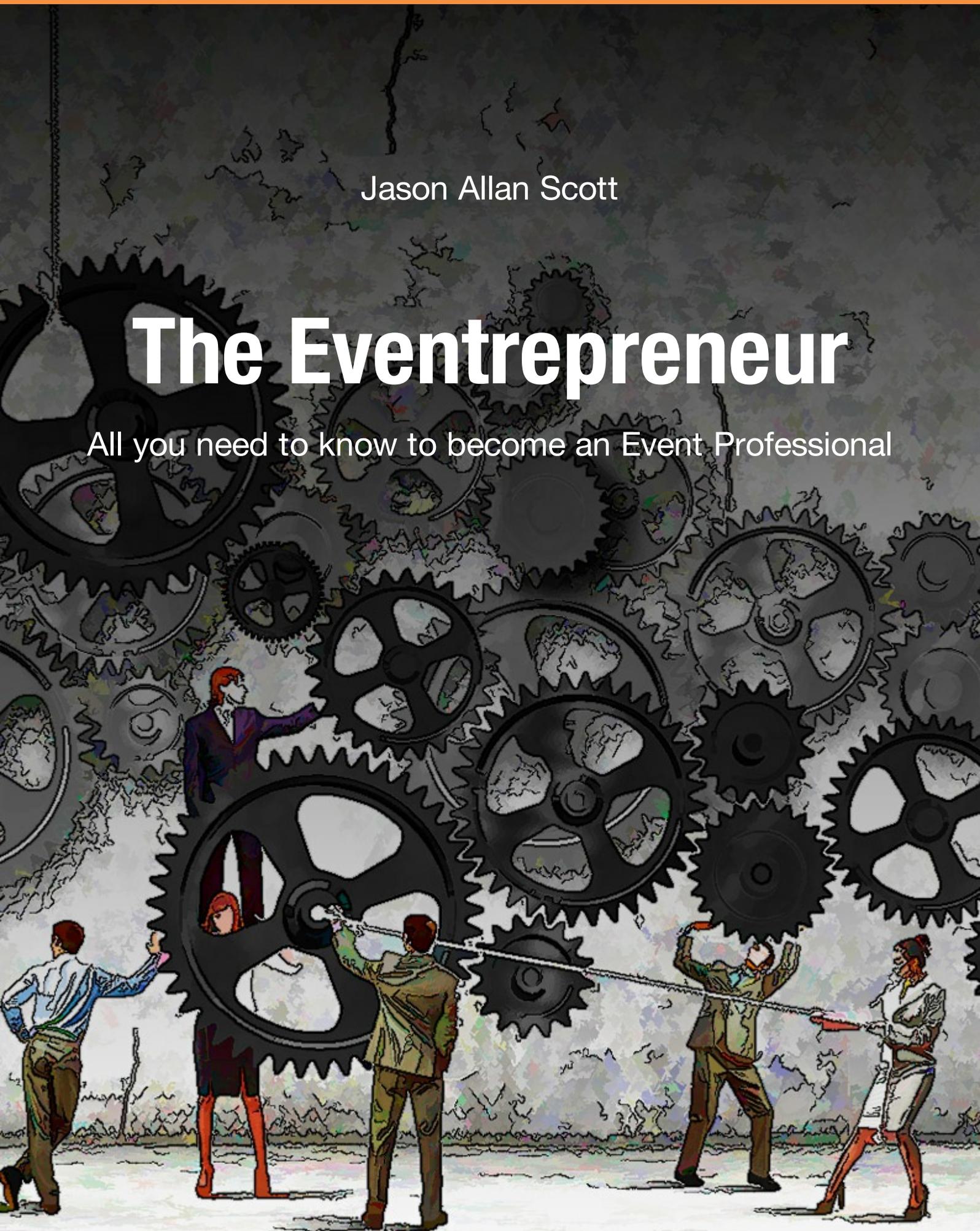


Jason Allan Scott

# The Eventpreneur

All you need to know to become an Event Professional



Jason Allan Scott

# **The Eventpreneur**

All you need to know to become an  
Event Professional



The Eventpreneur: All you need to know to become an Event Professional

1<sup>st</sup> edition

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## DESTINATIONS

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# Introduction

If you are organised, have plenty of energy and enjoy socialising, a career in event management could be the perfect path for you. Over the past 10 years, a career in this industry has become one that people aspire to. More than 50 universities in the UK offer dedicated courses to event management, not to mention thousands globally. This is not a career for a wallflower – a big part of the job is networking. The first and most important requirement:

**You must love people.**

A work hard, play hard ethos prevails and a recent survey showed working in the events industry is one of the top 5 most stressful jobs in the world. However, the vast majority of people working in the industry wouldn't swap careers.

This is both a book and a development course, and is a resource and an introduction to a system that I hope will open doors to both your dream career, but most importantly your dream life – as it has done for me.

So if I have not scared you off, let us begin.

# 1 Knowing the Employer

## The Learning Outcomes:

1. To examine your personal characteristics through imagery, reflection and assessment.
2. To generate awareness of personality traits preferred by employers of event managers.
3. To generate awareness of task traits preferred by employers of event managers.

**Goal:** To encourage you to examine yourself in line with behaviour preferences of employers of event managers.

## Key Words:

Personality Placement

Hospitality Industry

Task Orientation

Employment Preferences

## Introduction

Before embarking on a journey it is important to take an inventory of your resources and environment to assess feasibility. The same applies when choosing a career. Look at yourself and the industry that you are interested in pursuing. This chapter focuses on both self-assessment and career assessment.

Firstly, self-assessment will consist of generating a profile of your characteristics and traits. For the purpose of this study, our diagnostic scope will be at elementary level. We will not try to perform deep psychoanalysis; we want to reveal your most obvious personal characteristics.

Secondly, career assessment will reveal the employment preferences of event managers. Specifically, we will be looking at the personal characteristics that employers look for.

Finally, we will summarize by encouraging you to consider your personal characteristics and those preferred by employers. It is not meant to encourage or discourage you from pursuing the career of event management but rather to introduce you to the working environment in behavioural terms.

## Personal Characteristics

Personal characteristics are the traits that make each of us unique. Sometimes these traits emulate those of your parents or relatives, or they can be the result of life experiences. These personal characteristics make you no better or worse than anyone else and the effectiveness of these characteristics is situational and relevant to what you do.

Each of us possesses an array of personal characteristics and it is these that employers are interested in. Employers are aware that they cannot change individuals so, it is important to consider personal characteristics during the hiring process. In many careers, certain personal characteristics are more effective than others.

#### **Journal – Reflection #1**

As a component of this book, you are asked to participate in learning activities. They are meant to be fun, interesting and motivating and most importantly, will refine your understanding of the content.

The following exercise will set the stage for understanding ourselves, the importance of self-assessment in making career choices and how personal characteristics and an employment position are related.

#### **Follow these four steps.**

1. Take 2 minutes to think about, and write down 10–15 of your personal characteristics. Be honest with yourself.
2. Think about a job or position that you have held. List the personal characteristics that the position required in order to be successful.
3. Put the two lists side by side. Compare for similarities and differences. Are there characteristics that you possess that made the job easier or more pleasurable? Are there characteristics that the job required but you did not have?
4. Account for any similarities or differences that you found and reflect on whether the job was a positive experience or not. Were there requirements of the job that were just not you? If the job requirements were more like your personal characteristics, would it have been a better experience?

### **Employment Value Exchange**

An employment value exchange is an identifying system of the ‘give and take’ relationship between employee and employer. This process takes into consideration all the aspects of ‘value’ that can be exchanged in a workplace. An exchange of ‘time for money’ is a widely understood and a basic value exchange. But, it is by no means the only or most important value exchange between employer and employee. If we were to look at this concept in the form of an equation it might look something like this:

<b>Employee gives</b>	=	<b>Hard Work</b>
<b>Employer receives</b>	=	<b>Time</b>
<b>Employee receives</b>	=	<b>Satisfaction</b>
<b>Employer gives</b>	=	<b>£1000</b>

There is an evident ‘give and take (receive)’ cycle between the two participants. In this case the equation is balanced. The work done is worth the money and satisfaction received. Before we go any further, you are probably wondering what this has to do with event management.

Employment value exchange is a very important part of any job. It is a significant factor in motivation, satisfaction, productivity and trust in the workplace. If you are working where the employment value exchange is unbalanced or unfair, this can directly lead to a diminished enjoyment of the job. It is important for you to be aware of some of the forces that act on employees and their enjoyment of a job. To link this concept directly to you and your career choices, the following activity will reveal your career expectations and attitude.

**Journal – Activity #1**

Imagining your expectations and goals is a good way to clarify your personal attitude towards employment. I would like to ground your thinking in the present – ‘who you are **today**’. Keep in mind your personal characteristics and follow these steps.

1. Try to imagine your ideal job. What would it look like? Make a short list of descriptors – adjectives and adverbs – of this job. Perhaps include some feelings or emotional statements.
2. Without stating specific tasks or projects, what would your role be?
3. Which of your personal characteristics would you be using – often, seldom, never?
4. What would you give to the job, in terms of time, effort, sacrifice? What would you let the job take from you? Try to prioritize your personal values and beliefs in order to answer this.
5. What would you expect from the job, in terms of money, satisfaction, return of investment?
6. Plot an employment value exchange profile, as shown in the above exchange value equation.

In reflection of your career expectations and employment attitude from the above exercise, you have just begun to scratch the surface of ‘value exchanges’ that occur between employers and employees. More importantly, you have become aware that such a thing exists. It is important to realize that your personal attitude toward value exchange is a characteristic. In this sense, it is something that employers consider. Furthermore, employers may have a specific personal attitude that they deem as ‘ideal’ or more effective than others, in a particular line of work.

**Personal Characteristic Indicators**

Personal characteristic indicators are tools that can help individuals understand themselves in both a social and personal context. Characteristic indicators, assessments or inventories are processes that place individuals, in a general context, on a broad spectrum of behavioural features. For easier assessment, often the extremes of the spectrums are indicated but not the middle ground. This area is left for interpretation. Furthermore, the contents of the process are grounded on personal responses or interpretation of information – leaving much room for ambiguity. The results of a personal characteristic indicator should not be used as a basis for decision making.

Characteristic indicators should be used only to develop a personal awareness of interpersonal diversity. This understanding can help individuals better know themselves and others without comparing or evaluating each other.

A popular method for identifying personal characteristics is the Myers-Briggs Type Indicator (MBTI). The information provided by this indicator can be used to identify people's learning, understanding and social acting behaviour, amongst others. It can also help in understanding group behaviour (group dynamics). It can be said that 'who a person is' and 'what their personal characteristics are' is a product of many factors, such as genetics, environment, beliefs and experiences. This information can then contribute to and affect one's behaviour and perceptions.

The MBTI is based on the findings of Carl Gustav Jung's Theory of Psychological Types (1921). The MBTI categorises individuals as one of 16 basic personality types. These personalities are derived from four spectrums of characteristics:

1. Orientation to information and ideas – described as Extroversion (E) to Introversion (I).
2. Perception of information or ideas – described as Sensing (S) to Intuition (N).
3. Orientation to judgment or decision making – described as Thinking (T) to Feeling (F).
4. Orientation to environment – described as Judgment (J) to Perception (P).

Between each set of two descriptors, one is more dominant than the other. Of each of the four sets one descriptor is chosen, yielding four dominant characteristics. This would be a personality type. Eg. ESTP, INTJ etc. It should be mentioned that an individual would be placed on each spectrum using the results of a participant centred questionnaire or survey. The same questionnaire is given to everyone, thus the process is consistent.

The MBTI is widely used in business, institutions and for research purposes. If you can – explore the MBTI with your current employer, or see if you can take the questionnaire online.

### **Characteristic Description**

Reactive behaviour could be described as waiting until everything is done or all evidence is present, before you make a decision. This type of behaviour along with patience is valuable in many fields.

Proactive behaviour can be described as acting in an anticipatory manner. That is, not adapt to a changing setting but to change the setting. This is an important characteristic for business leaders and executives.

Directing is a leadership quality that implies one is confident and deals mostly in concrete answers. This is characteristic of very direct people such as managers.

Helping is a quality that depends on a deep concern for individual's needs. People in social work would behave in this manner.

It is unlikely that a person would be described by only one of these. In fact, every person will likely possess some aspects of each characteristic and be dominant in one or possibly two. The dominant characteristics would then describe or account for a larger portion of the individual's behaviour.

This does not mean that a person that ranks highly on the helping spectrum should become a social worker. It does mean that if 'helping' is a part of **you** then you might want to consider the use of that skill in a job. Furthermore, while it might be a dominant characteristic on this indicator that does not mean it is your greatest asset. Only further introspection and life experience will yield your true strengths.

### Employment Behaviour Preferences

Employers often maintain certain personal characteristics that they consider most important for each job they supervise. These characteristics are called Employment Behaviour Preferences. These preferences can be anything from personality to attitude. Moreover, it can be a specific part of personality such as behaviour tendencies or a sales mentality.

Employers often have a specific type of person in mind for a job. This may not include things such as education. It is primarily made up of traits such as confidence, positivity and first impressions. Beyond an employer's personal preferences, there are often industry dictated preferences.



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The position of event manager has employment behaviour preferences. These can be divided into two sets of personal characteristics or traits: Personality orientation, referring to an individual's personality tendencies, and task orientation, referring to an individual's attitude towards tasks.

### **Event Manager Employment Preferences**

Employers regard personality and task orientation as important aspects of an employee. With an understanding that specific behaviour characteristics within these two realms are important to performing a specific job, the personality and task orientation of an individual can give insight into their compatibility with that job. For event managers, personality orientation characteristics are concerned directly with customer relations:

Personable  
Caring of others  
Sense of Humour  
Attentive  
Flexible

Task orientation deals with an employee's expressive attitude towards the job, tasks and the customer as a resource. Employers of event managers look for the following traits:

Organized  
Service minded  
Sales mentality  
Team Oriented  
Motivated

### **Summary**

This chapter has led you through an educational process to help you understand yourself and the personal traits of being an event manager. By reviewing and reflecting on your learning, you now have the tools to look at a career choice from a practical and self-affirming angle. Use your learnings about yourself to become aware of your characteristics and your strengths. When choosing a career it is important to look at both your personal resources and those required by the job. Furthermore, it is important to be aware and to understand who you are and find a job that matches you.

## 2 Personal Characteristics of Event Planners

### The Learning Outcomes:

1. To explore the major functions of event management on a general level.
2. To identify the practical context in which event management exists.
3. To recognise the key characteristics that will lead to a successful event.
4. To develop an awareness of employer behavioural expectations

### Goal:

To provide you with an overview of the major functions and personal characteristic considerations in Event Management.

### Key Words:

Event Management Functions

Event Management Process

### Introduction

In Chapter 1, you were encouraged to examine yourself on a behavioural level. It is important to become aware of our personal characteristics. By doing so, an individual can discover their strengths, weaknesses, opportunities and threats (SWOT). This type of information provides a realistic view of one's self. While it is important to dream and to try to improve, change occurs only through experience. Before we can learn from our experiences, we must first become aware of who we are now.

This has a direct influence on this course and event management. Firstly, in any learning situation, being aware of our present knowledge is vital to acquiring new knowledge. This chapter will challenge you to look at new information and apply it to your existing knowledge. In doing so, the learner will create a custom and personal learning experience. Secondly, this chapter will discuss the position of event manager and outline the social context in which it exists. The major functions of event management that are described in this course will be introduced in behavioural terms.

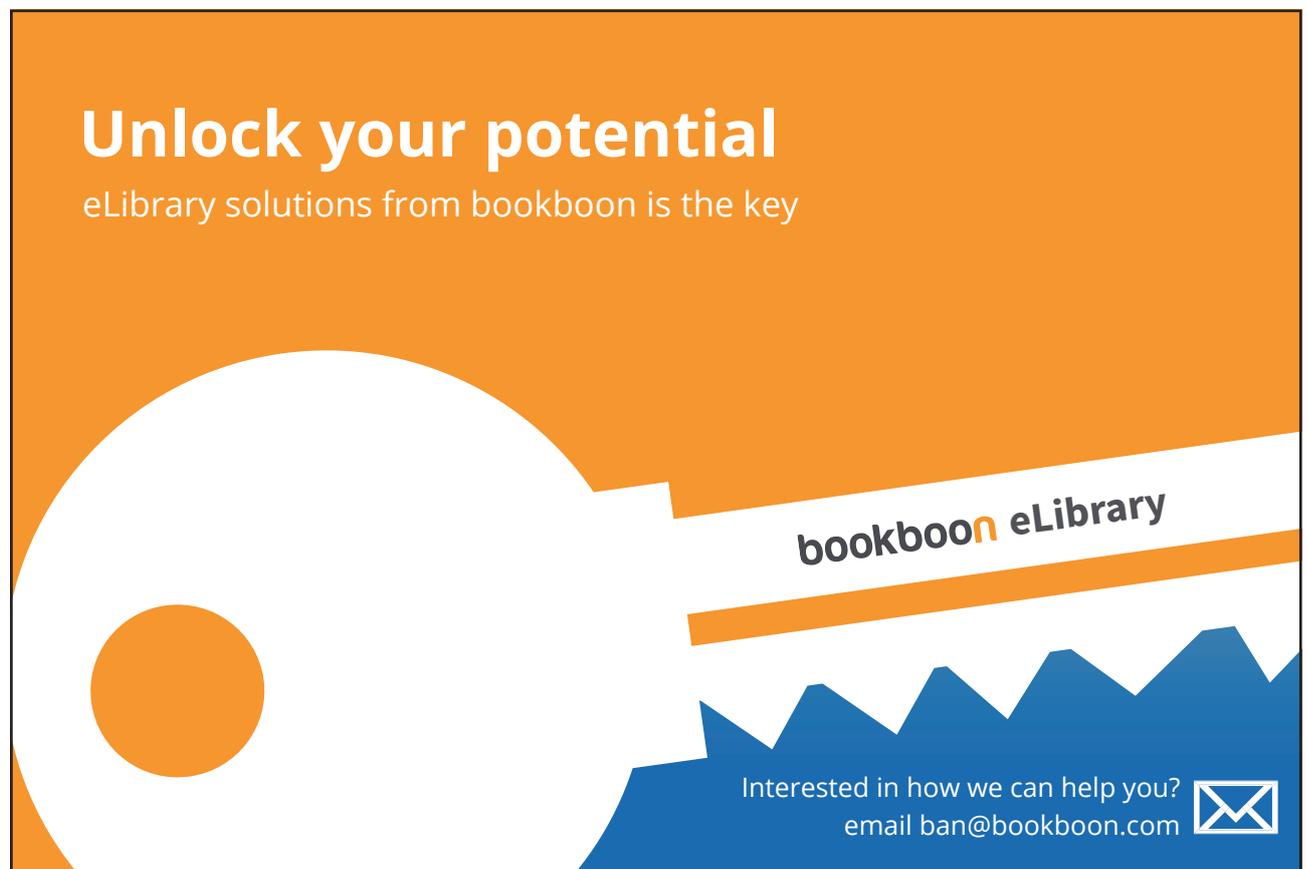
## Event Management

**‘What is event management?’ ‘Where does it occur?’ ‘Who are event managers?’**

Event management is a process and a project. Try to think of a public event – a concert, a baseball game, a fundraiser or a community development project. Each of these has three things in common – they were planned, marketed, and executed. Event management encompasses everything from idea to evaluation and from client to participant.

Event management occurs everywhere. Cities plan special holiday events, organizations put on events for certain occasions and plan large scale and well publicized events. Nations plan countrywide celebrations such as the 4<sup>th</sup> of July or Thanksgiving. These types of events need extensive planning, directing, coordinating, and organizing in all areas, not to mention direct marketing and sales.

Event managers are the individuals that orchestrate and coordinate events. A surprising number of people perform event management duties. While there are people or contractors who can be hired, event management skills are used in many other positions.

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## Social Context

Event management is, by and large, a human relations activity. It exists in a variety of environments and for several purposes. For example, events are for fundraising. The intent and purpose of the event is well defined and justified. Events are also planned for educational or social awareness or for business or profit reasons. In any case, the event exists within a social context. This social context can have an effect on the behaviour of participants, specifically, the event manager and planning staff.

Event managers must consider not only the planning and business components of event management, but also the social impact that the event and its coordination will have on workers, participants and the community. It is important that event managers are aware of this pending responsibility.

### Journal – Reflection #1

Personal perceptions of the social role of events are an important aspect of event management.

What types of events have you seen or experienced? Do you feel that there were social implications of any of your events? Make a couple of quick notes of these findings.

What kind of an impact did these events have on you? How do you think they affected the community? Were they planned to have that effect?

Did the events play a purposeful role? What role do you think they should have played?

## Functions of Event Management

The following are the 5 major functions of event management. They are areas of planning that an event manager and event staff would consider and it is important to realize that in event management, each of the major functions seldom stand alone. This means that it is impossible to plan or consider one function exclusively. All of the functions are planned at the same time, with reference to each other.

This course identifies the 5 major functions of event management: **organisation, human relations, catering and food services, marketing and fundraising**. The following is a brief overview of these planning functions to introduce you to event management. While you are reading this section, try to piece together the general event management framework within which planning must exist.

It is important to recognize that while the process appears to be in a linear model, it does not necessarily occur in this fashion. Often steps within this process occur at the same time, repeatedly and in reference to other steps.

## Human Relations

Human relations are a prime example of a function that spans the entire planning process rather than being a specific planning step. Human relations are also the broadest function. It includes everything from personal behaviour to human resource planning.

It is important to be aware of the environment in which human relations exist. This is helpful in understanding and interpreting human relations behaviour. Management functions are related to the behaviour of the event management team. The following are important human relations skills that an event manager should possess and will use throughout the event management process:

- Motivation
- Leadership
- Trust Building
- Decision Making
- Problem Solving
- Conflict Resolution

Finally, human relations also identify a human resources model for the workplace. Human resource management plays a vital role in positive human relations and such a model would consider both the environment and human relations skills as they can be applied to the workplace.

### **Catering and Food Services**

Catering and food services is an example of a planning process – within a planning process. It is the only major function that can stand alone to the other functions. Catering is often an externally contracted service thus; the planning is often disconnected from the other event considerations. However, whether a catered meal is the event or whether it is a component of an event, it will follow the same planning process. This is why catering and food services is a process within a process. The presence of all of the 5 major functions of event management are likely to be a part of planning for catering, but are a consideration of the caterer. The event manager and caterer are both likely to use the following planning process to plan for catering:

- Assessing resources
- Planning a timeline
- Facilities and caterers
- Developing a picture of customer needs
- Planning for team work
- Menu planning
- Service planning
- Alcohol and beverage planning
- Evaluation

## Marketing

Marketing is the combined efforts of the organisation towards effective advertising, adequate public relations and a positive public image. The following are the 5 planning phases of a marketing strategy. Each phase is geared towards developing public awareness of the organization and an appropriate image.

- Preparation
- Planning
- Particulars
- Production
- Post-Production

## Fundraising

Event managers need to understand the importance of fundraising as it is a major source of monetary funding. Furthermore, event managers need to be aware of the personal aspects of fundraising. Why do people give donations? Why not? How do you ask for a donation?

Could you think of 101 new things to do with eggs and oil?

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## Personal Characteristics

The first chapter was geared to helping you discover yourself – your strengths, weaknesses, opportunities and threats. This chapter will help you understand why and how you perceive things and how to connect and store your existing knowledge with your new learnings.

**Established goals and objectives** – A good beginning is the key to success. Goals and objectives establish a solid and well-planned foundation to work from. An achievable goal is one that you have to work for and good objectives are direct, task oriented and clear.

**Pre-event assessments** – Knowing where you are at the beginning is the key to ending up where you want to be. A thorough investigation of your human, physical and financial resources is always a good place to start.

**Effective planning** – Good planning is comprehensive, focused and timely. Furthermore, planning from the top to the bottom needs to be of the same quality; otherwise it will be in vain.

**Sound marketing strategy** – A strong marketing strategy involves market assessment, planning for organisational image and directed advertising.

**Appropriate evaluation mechanisms** – The key to learning from your experiences is to evaluate with the intent of learning. A good evaluation system is planned early in the process and looks only at areas that we can learn from.

### Journal – Exercise #1

What are the elements that you think contribute to a successful event? List the elements that you think the participants would consider important. List the planning elements that you feel would contribute to failure.

# 3 Planning

## The Learning Outcomes:

1. To identify the types of planning required of event managers.
2. To establish a planning process.
3. To explore a planning sequence model and framework.
4. To identify the personal characteristics needed in event management planning.

## Goal:

To provide you with the opportunity to explore and experience 'planning' in event management.

## Key Words:

Objective

Selling

Planning

Planning

Framework

Planning

Model

## Introduction:

Event planning is the process of coordinating and arranging resources in a way that the specific product (the event) is produced. In many cases, planning is subdivided into several specific types. In event management, there are organizational, human resources, food services, marketing and fundraising – each unique in its own right, but similar in structure. This chapter will define each specific planning type. It will discuss the mutual planning framework that exists in each, followed by a generic strategic planning model. Finally, a practical checklist will be provided.

## Types of Planning

This course outlines the 5 major areas of planning in event management. Chapters 3–7 reveal the specific types of planning that occur in event management. Please refer back to the contents page for which chapter refers to the specific areas of event planning.

## Planning Framework

There are three necessary elements of planning – analysis, strategy and evaluation. Each must occur in an effective planning process. Furthermore, this framework creates cohesion, ensuring that each stage is linked to the others.

**Analysis** is the process of establishing a concise statement of purpose, assessing resources and producing a proposed action plan. Goals and objectives are used to focus the project. Feasibility studies, SWOT analysis (chapter 6) and budgetary assessments are all used to provide an accurate, realistic picture of the situation. A comprehensive proposal is then created.

**Strategy** is the process of technical planning. Identifying and planning the major components of a project are done at this stage. This is the stage where goals, objectives and expectations are turned into realities. This stage deals with planning for the specifics, such as workforce, marketing, details, and outsourcing.

**Evaluation** is both a formative and summative function. It occurs throughout the event planning and at the end. It considers the process, the people and the result of the project. The evaluation stage is meant to be a learning component, not a testing one.



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## Planning Model

Beyond the planning framework, each step also follows a generic system. The following generic planning model expresses the system that is used to guide planning functions.

### Identify problem

- Set objectives
- Assess organizational situation
- Identify tasks and procedures
- Identify alternatives
- Establish expectations or anticipated results
- Review or obtain approval for decision
- Obtain feedback and make changes to decision
- Execute decision
- Evaluate feedback on action

#### Journal – Exercise

Review the above planning model. Does it follow a logical process or series of events?

Think about how you plan projects. Do you use a systematic procedure? Do you tend to think in processes or free flowing?

Think of a project, such as washing your car, and use this system to plan the process you would use to wash your car. As you encounter problems, such as the need for a hose, plan how you will overcome the problem.

In the end, critique or evaluate your process and ask yourself – what could I have done to make it easier or more efficient?

## The Event Planning Process

1. **The idea** – The original idea for an event can come from a client or a demonstrated social need. The idea must be qualified before it is accepted and planned.
2. **Establish goals and objectives** – At this stage the idea is elaborated on and goals and objectives are created.
3. **Feasibility and resources assessment** – Both an internal and external assessment is done of the idea. It is tested in the market for suitability, selling and market potential. A financial assessment is done to see if the organization can adequately perform to yield a successful event.
4. **Event proposal and long-term timeline** – Using the above information, a timeline is produced. This is submitted to the client or board of directors, in the form of a proposal. It can then be approved or declined as a feasible activity.
5. **Event planning begins** – The formal planning and structural coordination is then implemented.

6. **Plan the evaluation process** – Planning the evaluation process is often done at the very beginning. Items such as procedures, event success, communication and client feedback are important to evaluation. Once an event is completed evaluation can become very biased and a mere formality so it is crucial this is planned at the beginning of the process.
7. **Plan for human resources and communication structures** – The planning of human resource and organizational communication structure are the first steps to planning an event. This stage involves designation, delineation and direction of those involved in the event.
8. **Plan for externalities** – Many planning considerations require outsourcing or external research. Booking buildings, grounds, caterers, rentals, etc., are important considerations. Furthermore, they often need to be booked well in advance of the event. Also, some planning logistics such as legislation require research.
9. **Plan specifics of event** – Planning the specifics of an event are also important. In fact, other planning considerations may be dependent on these specifics.
10. **Plan for marketing strategy** – Planning for the marketing strategy is perhaps the largest planning component. Although, it is listed near the end of the planning process, it is indirectly occurring at the same time as all of the other steps.
11. **Review arrangements and evaluate progress** – Before the event is released to the public, it is vital that all of the plans are solidified and all arrangements are verified. This stage is a good opportunity to evaluate the progress of the planning.
12. **Begin marketing and publicity** – Beginning marketing and publicity is a very exciting time in event management. It is also the most challenging. Creating and maintaining a certain public image along with advertising the event is very difficult and detailed. It requires specific regional information and market data. With the variety of marketing tools and systems available, it is difficult to know which is best.
13. **Execute event** – This is the most important day and sometimes the hardest to plan. It requires letting the event take place – something that is often hard to do.
14. **Evaluate success** – There are two major areas of evaluation. The event manager and board of directors evaluate, and the client and participants evaluate. Keep in mind that evaluation is a learning process.

Through this planning process it is obvious that it follows the planning framework established earlier in this chapter. The first five steps are related to an analysis of the situation. Steps 6–13 are related to the strategic planning process. Finally, step 14 is evaluation.

**Journal – Activity**

Review the above process and the previous planning model. Imagine that they are side by side. Examine and compare their components.

What do you notice? Are they similar? Do they include common steps? Is there anything missing from one or both of the processes? Do they both include the planning framework mentioned previously – Analysis, Strategy, and Evaluation?

Try to imagine the role of the event manager following these processes. What characteristics or skills do you have that could help you in planning with these processes?

**Checklist**

This checklist is generic and can be used for any aspect of the planning process or an entire process.

What do I want to do?

What do I have that I can use?

How will I go about doing it?

Who is involved?

What is our image?

How can we evaluate our success?



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**Journal – Reflection**

This exercise is meant to help you develop an attitude or a level of expectation of events. Your ability to identify your expectation will have a direct impact on your ability to plan and co-ordinate successful events.

Think back to an event, of any kind, that you have been involved in or attended. What were your expectations of the event?

What are some of the things that stick out in your mind? Are they related to the above five indicators of a successful event?

**Personal Characteristics**

Your ability to develop appropriate expectations of events is vital to successful event management. Reasonable and attainable expectations are not only essential to solid planning, but are equally important to human relations (Chapter 4). Conveying expectations in an assertive yet motivating way is critical.

Event managers are the central figure in planning. Thus, the ability to organize others and maintain exceptional personal organization is vital. Keeping track of who, what, where, when and how of the project and keeping others informed of the same can easily become a mountainous task. Event managers deal with customers, plan for employees and depend on volunteers. This requires patience, understanding and a desire to help everyone.

# 4 Human Relations

## The Learning Outcomes:

1. To describe the organizational communication considerations of an event manager.
2. To develop an awareness of human relations, relating to management functions.
3. To provide insight into a working model for human relations in event management.
4. To discover personal characteristics that could be used in human relations.

## Goal:

To develop an awareness of human relations within each major function of event management.

## Key Words:

Personnel  
Client Relations  
Human Relations  
Leadership  
Volunteers

## Introduction:

Although planning is a mountainous task in event management, the most important personal characteristic is not planning, it is human relations. The ability to effectively deal with people, clients and participants is vital. Communication and leadership skills are an event manager's greatest asset. Human relations are the foundation of event management, as you will see in upcoming chapters.

Human Relations is a combination of: client relations, employee relations, organizational relations, volunteer relations, and public relations. The ability to motivate, lead and develop employees is considered human relations skills. Human relations are a group dynamics process. It involves the interactive relationship between: employees, volunteers, clients and management. Each group not only interacts from within, but also interacts with the other groups. The human relations skills that each person and each group possesses determine the success of the interactions.

## The Environment

Perhaps the best way to describe human relations is to describe the environment in which it exists. Within each social group there is a system, a communication flow chart. At the same time, each group exists within a larger system – the organization. The organization then exists within an even larger system – the market place. Human relations are the vehicle that links all of these systems together.

The employees' group is divided into sub-groups that perform general tasks, therefore group communication and operating processes exist to help coordinate the group's tasks. It is within these processes that human relations skills are used.

The employee's group is then linked to the other groups through human relations skills and processes. Employees are linked to management, due to the nature of their working relationship. Employees are linked to clients by performing tasks that are planned to satisfy the client's needs. The employees are linked to volunteers by a common vision or organizational goal. The structure of the communication system is affected by those operating or communicating within it. Ultimately, positive human relations are the glue that holds all systems together. This is an overview of the environment within which human relations operates.

The following is an inner picture of the environment. We will look at the position of the event manager in the organizational structure. Event managers usually work within one of two organizational frameworks. Firstly, an event manager can be independently contracted to perform event planning. Secondly, event managers can work for a large organization. We will frame this discussion of organizational structure to the later. It will provide an all-inclusive approach.

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Event managers are often positioned at the hub of the organizational structure and for good reason. The event manager is a coordinator and must be in contact with all parties, keeping them up to date with activities.

**Journal – Activity #1**

Think about a job or position that you have worked in. What was the organizational structure? More importantly, what was the structure of the communication lines? Was communication mostly one way?

Describe the environment that this position existed in. Would you characterize it as a positive human relations environment? What were some of the external aspects of the human relations environment?

The following is a network schematic of the event manager in an organization.

**Management Functions**

Management functions such as motivating, leadership, team building, trust building, decision making, organizing, directing, problem solving and conflict resolution are prime examples. These functions are rooted in dealing with people. Furthermore, each function requires specific personal characteristics and attitudes. The ability to embody these attributes and behave in a positive and constructive manner is essential. This section will discuss the importance of human relations in management functions and the personal attributes that event managers should possess.

**Motivation** – The ability to keep employees motivated is an asset. Motivated employees enjoy their work, are more productive and are more attentive to customer needs. The role of the ‘motivating manager’ is two-fold. Firstly, managers are responsible for providing personal support, encouragement and guidance to employees. Secondly, and more challenging, managers are responsible for creating and maintaining a positive work environment for their employees. In both areas, managers must be personable, trusting and respectful of their co-workers.

**Leadership** – Leadership encompasses almost everything and relates to every action a manager makes. It is also the most important ingredient in organizational success. However leadership is probably the most failed function of managers. There are two major considerations that one must be aware of to provide leadership. Firstly, leaders must be aware of their own biases, action and reaction toward others.

Secondly, they must also understand and be aware of others’ actions. Consider the following analogy:

If there was one employee who performed 10 actions and one leader who had 10 biases, 10 actions and 10 possible reactions to employee actions – there would be 1000 possible interpretations to any situation.

Leadership, as a human relations function, is affected by an enormous number of factors. To be a successful leader can be difficult. In fact, leadership is built on general principles that can be applied to many situations. Leaders must possess vision. Vision is a sense of personal direction, grounded in personal values.

**Trust Building** – Trust between management, client, employees and volunteers is the key to a successful relationship and organization. It is the role of the manager to develop trust. The event manager trusts that the client will pay. The caterer trusts that kitchen will be clean and ready for use. Co-workers trust in the abilities of each other. Trust building is a long term process and require constant and ongoing attention. Every action by every person must be rooted in trust.

**Decision Making** – Decision making that is both democratic and involves the employees is very effective. Managers facilitate organizational decision making, on all levels. This often requires understanding, openness and acceptance of new ideas. Managers that choose to involve employees in decision making to learn from their employee are often satisfied with the decisions.

**Problem Solving** – Managers perform problem solving constantly. Problem solving consists of two components: following a problem solving process and dealing with people. A problem solving process would include; examining the facts, identifying the problem, developing alternative solutions, Examining the pros and cons of each alternative, choosing a solution, Implementing the solution and finally Evaluation.

Dealing with people, on the other hand, does not have a process. It relies on the manager's human relations skills; such as objectivity, open mindedness, logic, non-confrontational, persuasive and patience.

**Conflict Resolution** – Perhaps the least understood and most difficult to implement, is the management function of conflict resolution. The event manager often must smooth situations out because he/she is ultimately responsible for event success. Skills such a patience, impartiality and emotional control are virtues in conflict resolution.

**Journal – Exercise #1**

In the same job or another that you have had, preferably one that you had a supervisor or manager, what management skills did she or he possess?

Try to apply or match some of those skills to the ones above, to components of the manager's job. Do the managers skills and the components of the job match? Does the manager naturally fit with his or her job?

In the same situation, did you naturally fit your job?

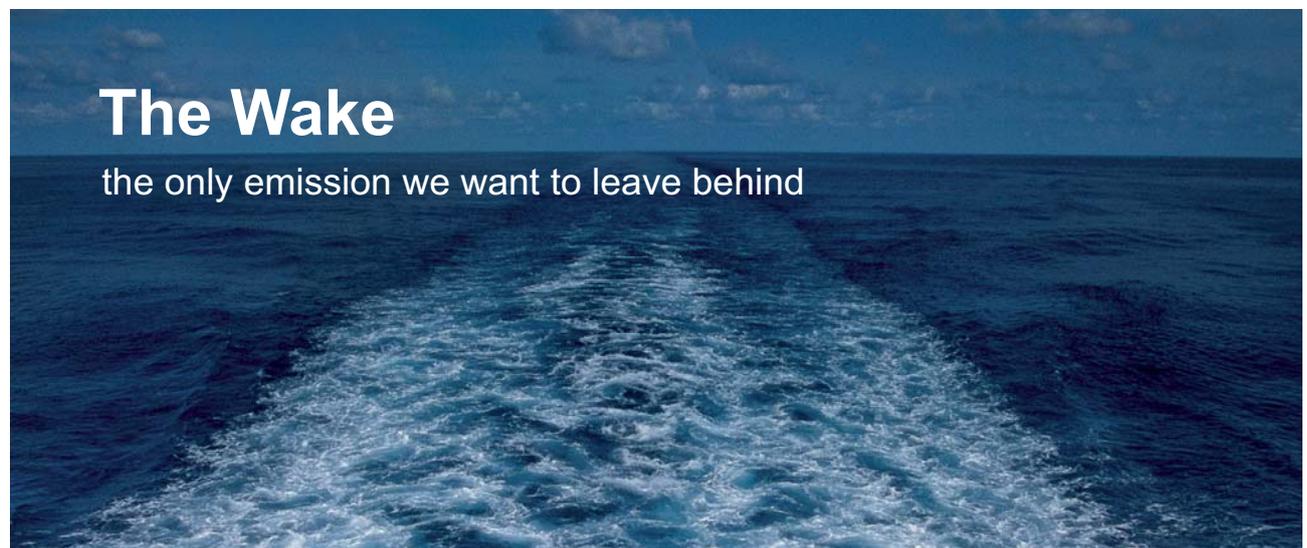
## Human Resources

What is the difference between human relations and human resources? Human relations are the entire set of relationship and processes they occur in and around the workplace that involves employees, management, clients and volunteers.

Human resources are a specific type of relationship that is characterized by one group leading, motivating, developing and utilizing another group. For the purpose of this paper we will study one specific human resource model. This model will define the relationship that we are studying and place it in the context of event management. Furthermore, the importance of human resource management will be established.

A human resource model is used to give practical credence to the process that the leader – follower relationship is based on. The Recruiting, Retention and Recognition model describes the leader – follower relationship from its origination, it is a management process, grounded in positive human relations, that establishes an ongoing relationship between leader and follower.

Before we begin there are several assumptions that should be stated. Firstly, the RRR model is based on the positive, ethical and value nature of a relationship. Secondly, any relationship that is untrusting, unethical and is not based on value and respect for the parties involved cannot be considered human resource management. Thirdly, both parties – leader and follower – must be aware and in support of the relationship. The following is a snapshot of the RRR process of human resource management.



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**Recruiting** – The recruiting stage involves organizational assessment, marketing and selection. It is more than just finding people. It is being aware of your organizational needs and the needs of recruits. More importantly, it is a well-planned human relations exercise.

Organizational assessment requires an in-depth review of organizational objectives, policy and human resource needs. This would be the first step in organizational human resource planning. The most important thing to consider is the job description of the position being filled. The recruitment stage is vital to establishing a lasting, positive relationship. There must be trust, honesty and genuine respect from the beginning.

**Retention** – Once human resources are selected, the process of retaining them begins. Retention is important to an organization for two major reasons. Firstly, employee turnover – hiring and firing – is very costly. Secondly, maintaining the experience and knowledge of long-term employees is an asset to an organization. The retention process consists of trust, support, and motivation.

**Recognition** – The recognition process involves a broad spectrum of retention, motivation and satisfaction improving mechanisms in the workplace. It is often equated with reward and awards, but is actually a much larger process. It is the combined efforts of human resource recruiting and retention. Similar to motivation, there is an art to choosing the appropriate time, place and type of recognition to use.

The RRR Model provides a foundation for planning human relations and reveals many of the rudiments involved in human relations. In event management, because of the nature of the work, this model can provide valuable insight into human resource management and employee behaviour. Furthermore, the utilization of the RRR Model goes beyond the leader, follower and co-worker relations, and is useful in all relationships. It is ultimately an avenue to positive human relations.

**Journal – Reflection #1**

Review and critique the above RRR Model. What do you think of it? Is it practical? Will it work in the workplace?

Have you ever worked in a place where a similar model is in use? If not, try to find someone that has. It is unlikely for a work place to employ absolutely none of these strategies.

Using the three headings in the RRR Model, describe the workplace. Are there any areas, from the model, that the workplace did not use? Are there any areas that the workplace did an exceptional job?

# 5 Catering and food services in Event Management

## The Learning Outcomes:

1. To establish a general planning process for Food and Beverage administration.
2. To identify customer satisfaction components of a successfully catered event.
3. To understand the external considerations of planning a catered special event.
4. To discover personal characteristics that are needed to successfully plan a catered special event.

## Goal:

To provide you with the opportunity to explore the major considerations in catering for a special event.

## Key Words:

Catering Timeline

External Considerations

Planning Process

Health Regulations

Liquor License

Legislation

## Introduction:

Before we begin to identify the specifics of coordinating catering, food and beverage services there are several assumptions that should be established.

Firstly, we can assume that the event manager or Board of Directors has already decided on the type, purpose and occasions of an event, and has performed the initial planning specifics of the event. Referring to chapter 3, we have already viewed the initial planning consideration in event management and can assume that by this point in the event planning, it would be done. Secondly, that an event manager will be either using an in-house facility and catering service or will be contracting out these services.

### Role of the Event Manager

The role of the event manager, in catering, food and beverage services is two-fold. The first major function is as a coordinator. The event manager coordinates and administrates both human and material resources, to yield an event product. The second major function is that of a customer service specialist. The most important skill, for an event manager, is the ability to turn ideas into reality, and needs into satisfaction. Furthermore, the ability to clearly communicate, listen and understand what others want or need is the key to success.

### Meeting Customer Needs

The ability to meet customer/client needs is both an art and a science. It takes personal qualities such as attention to detail, persistence, understanding and patience. It also requires a systematic process. Discovering or interpreting needs and then developing your own picture of what is desired is the art. The ability to develop objectives and a process to materialize the desire is the science.



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## Legislation

Before moving on to the planning processes and considerations for catering, food and beverage services, there is one other external consideration. A major component of planning for catering, food and beverage services is an awareness of local and Council/State legislation regulating health standards, food and alcohol. Most major governing bodies have some form of legislation that provides guidelines for these issues. In many cases there are guidelines set out to control who and how food can be prepared and served in public.

In the field of catering, food and beverage administration there are regulatory legislation and laws that impact upon planning and decision making of event managers. There can be legislation on who, when and how alcohol can be served, age limitations on who can serve alcohol, time constraints on when alcohol can be sold and how much alcohol can be served to an individual at once. There are also licensing and permit considerations when planning to sell alcohol at a public or private function. It is vitally important that the event manager is aware of such legislation as an infraction of one of these laws can result in legal or criminal action. There are also health regulations that must be adhered to.

The following journal entry will help you become aware of such legislation.

### Journal – Activity #1

Catering, food and beverage legislation varies throughout the world. It also varies within a nation and its states and provinces. Furthermore, these types of legislation are constantly evolving and changing. For this reason, an event manager must keep up to date and be well versed in local legislation.

Interview someone you know, such as your parents, spouse or neighbour, about a major special event that they attended. Ask them to brain storm with you to make a list of all the food and beverage related issues that existed at the special event.

Try to think not only about the meal that was served but also how it was served, prepared and planned. Think about the food that was served and what issues could be related to that food, such as fresh vegetables.

Next call or drop by your local, provincial or state government office and research catering, food and beverage legislation. There should be books, manuals etc. where this information can be found.

Try to relate your legislation findings to your discussion on food issues. What types of considerations were there? What types of issues are related to the role of the event manager? What issues would be related to satisfying customer needs? What limitations are there?

In coordinating catering, food and beverage services an event manager would consider preparatory planning and task specific planning, both of which are directly related to satisfying the needs of the customer. The initial preparatory planning is mostly to do with information collecting and long term scheduling.

The task specific planning deals directly with what the customer will be experiencing. Thus, these are the issues that are most relevant to meeting customer needs. The following sections elaborate on preparatory planning, planning to meet customer needs and concludes by addressing evaluation consideration.

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## Preparatory Planning

In preparatory planning for catering, food and beverage services, there are three areas of concern. Firstly, the event manager must try to assess available resources and budgetary limitations. Secondly, the manager would start to establish a planning timeline for the rest of the project. And thirdly, the event manager would want to consider facilities and caterers in terms of finding and negotiating contracts. The following information contains all the essential information that an event manager needs to accurately and effectively shape customer needs into reality.

**Assessing Resources** – As with any business it is important to know what you have, in order to definitively say what you can do. There are 3 types of resources that an event manager would look at or assess before attempting to plan, coordinate and meet customer needs – human, monetary and material resources. Each of which are equally important in determining what an event manager can do to satisfy client's needs.

Human resources provide information on what types of services the event manager or organisation can provide and which will have to be contracted out (for example catering). If the event manager's organisation cannot provide the number of persons required to provide full service catering and the customer desires full service, then they will have to be contracted.

Assessing material assets, such as facilities, also provides valuable insight into what types of services can be provided to a customer. This type of assessment might also look beyond the resources necessary to provide an event and at the materials needed to plan, market and set up for an event.

Finally, monetary resources are almost always needed to administrate an event. Although it may be possible to get some 'front money' from the sponsoring organization or the client, it is sometimes not possible. And in that case, not only does the organization need to provide the front money to get the project underway, it also increases the organizational risk involved.

**Planning a Timeline** – Preparatory planning for a special event involves establishing what is called a 'project timeline.' The timeline can be as detailed or general as preferred. Considerations such as communications with people or appointments are often difficult to plan in advance. The timeline would be continuously changing with additions and deletions.

Often event managers use this tool as an indication of their progress or success. The managers take pride in checking off finished tasks. It can also be used at the end of a project to review and evaluate one's success.

**Journal – Exercise #1**

The following exercise is meant to help you develop skills in establishing a timeline for a project.

Think about a small project that you have recently completed, such as an essay for a class. Develop a timeline that would help or guide someone else reproduce the same project.

Make entries for everything that you did in preparation for the project and for actually doing the project. Don't be too detailed, only write a sentence or two for each entry.

**Facilities and Caterers** – The reason 'facilities and caterers' is in the preparatory planning stage is because both facilities and caterers are in great demand and need to be considered early, often requiring booking a year in advance. Another issue to consider when planning for facilities and caterers is contract negotiation. This can involve discussing payment and staffing issues. Furthermore, caterers will often require a guaranteed number of people to cook for. It is important that you are accurate in your estimation and generally both the facilities and the caterers will likely require a deposit to reserve their services.

**Meeting Customer Needs**

Meeting customer needs involves a systematic process and some finely tuned personal characteristics. It involves developing a picture of the customers' needs, being able to work with a team and performing menu, service, and beverage planning. Each of these components separately, is nothing, but together they are the key factors to providing an unforgettable and satisfying experience for the consumer.



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### **Developing a Picture**

A painter can have all the paint colours in the world, the finest canvass and have apprenticed under Leonardo da Vinci, but, without a picture in his or her mind, they will not be able to paint a picture. The same applies to an event manager. If the manager cannot develop a picture in his or her mind, of what the customer desires, then it is unlikely that he or she will be able to fulfil their needs. In order to create this picture, an event manager should possess certain personal traits and behavioural characteristics.

The following are some of the personal traits that help in developing a picture of customer needs.

1. Being able to listen attentively.
2. Have a counselling attitude towards customers.
3. Being able to identify vital aspects or concerns of the customer.
4. Asking a lot of questions.
5. Visually developing a plan and process to success.
6. Being persistent and patient.

### **Working with a Team**

Working with a team of people is a significant responsibility of an event manager. Three responsibilities of the event manager, when dealing with a catering team, are the following.

Firstly, a broad knowledge of food preparation principles, staffing and labour costs is needed. The event manager should also be prepared to ask the caterer any questions regarding uncertainties or concerns that the client might have, such as vegetarian meals or other special circumstances. Secondly, the event manager should be able to come to the caterer with a clear statement of personal expectations and those of the client. Finally, the event manager should be armed with a complete or partially complete Site Analysis worksheet for planning purposes. A site analysis should include the following information,

- Size of room/available seating plan
- Stage and access to building/AV Equipment
- Kitchen facilities/Linens
- Lighting/Flooring type/Decorating limitations
- Security and bar tending specifics
- Restrictions – non-smoking, noise, open/close times, insurance

## Menu Planning

Planning a menu is creatively challenging and an individually sensitive issue. In fact, for something that is so minute, in the whole scheme of things, it often causes a lot of difficulties. If there is one thing that a participant will remember; it will be the menu and the food. When trying to decide what to serve at a special event, there are a couple of factors that can quickly help narrow the field of choices. Harry Freedman (1991) suggests that looking at the following can help:

**Market** – Who will be attending the event?

**Scope** – The number of people being served.

**Location** – Where will you be serving the meal?

**Time** – The time of the day, which meal.

**Budget** – How much money do you have?

After you have factored in these issues there are a much more reasonable number of choices of food for a meal. Once you have narrowed the field of choices, there are two other considerations. Simply, the meal must look and taste good to everyone. Therefore, the following should be considered. Firstly, the meal should be nutritious so that it fulfils the bodily requirements of a meal. Secondly, it is important to consider the colours and textures of food and include a variety. Finally, when the menu is being planned, it should be approved by the client to ensure that it fulfils their expectations.

## Service Planning

Service planning refers to the plan that the event manager, client and caterers work from, when it comes to serving the food and drinks. The service plan is often established alongside the menu because they are closely related. Considerations such as the meal courses and timing are often written on the menu, e.g. cocktails 6pm and dinner 7pm. More specifically, the timing is often planned with the number of guests and the number of meal courses in mind. Furthermore, the ratio of servers to guests is also calculated at this stage.

Another consideration, which is related to aesthetics, is the table and place setting layout, and the colour and dress of the servers. The layout should reflect the number of courses at the meal. The server's dress code should be relevant to the occasion. If it is a black tie event, the servers must dress accordingly.

### Alcohol and Beverage Planning

The final planning consideration is that of alcohol and beverages. The major issue in alcohol and beverage planning is cost. Another factor to consider is the legislation that was discussed previously. And finally, the biggest beverage decision is what to serve. Your best resources to help you decide are 1) the type of event and 2) the desires of your client. If the event is children oriented then soda and juice are safe choices. But once you enter into the adult realm, things become a little trickier. It is not necessary to have 10 different kinds of beer. Instead go with 1 or two brands and a light beer. With wine, depending on the class of the event, have a red and a white on hand. Finally, with liquor only order alcohol that can be made into multiple drinks. Also be sure to have a variety of mixers, such as water, soda, juices and coffee. The three important things to keep in mind when planning beverages are:

1. Plan beverages that are appropriate for the event.
2. Be sure to consult your budget before you plan beverages
3. Get everything approved by your client.

Each of the above planning elements requires a great deal of insight into event planning and dealing with customers, co-workers and organizations. Much of this will come from increased experience in event management, but a naturally creative and innovative inclination is helpful. Working with a team of caterers requires persistence and patience. When planning menu, service and beverages it is important to always link it back to customer needs.

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## Monitoring and Evaluation

As we suggested above, the timeline can be used as a monitoring and evaluation tool. The event manager might also choose other alternative methods for evaluation. For example, he or she might use a checklist such as the following one to monitor progress.

- Develop objectives from client's needs and consult with client to develop a picture of the project
- Research pertinent legislation
- Assess your resources and reserve facilities
- Develop a long term project plan
- Plan menu, service and beverages
- Monitor progress
- Evaluate success

The event manager is not the only person that will be evaluating the special event and the catering. The caterers, the guests and your client will be evaluating the event. It is understandable that each party will be evaluating a different thing.

The event manager might be interested in evaluating processes such as communication or budgeting. The caterer might want to evaluate the quality of the food and service. The client might want to evaluate the overall success of the event. The following activity will help you discover what the participants might evaluate.

### Journal – Reflection #1

Think about an event that you have attended where a meal was served. Reflect on your overall impression of that event.

How did you perceive the event? What was your experience of that event? Was it a success? Did you enjoy it? What was the food like? How would you rate the planning of the event? Were there things left out?

In your journal, design an evaluation tool that you, as the consumer or participant, would use to evaluate the event. Try to remember that you are a participant and do not have any inside knowledge. Only evaluate the things that you were able to experience as a participant not a worker or planner.

# 6 Marketing

## The Learning Outcomes:

1. To develop an understanding of marketing in event management.
2. To develop an awareness of marketing strategies.
3. To discover the necessary personal characteristics in marketing.

## Goal:

To provide you with an understanding of marketing in relation to event management.

## Key Words:

Marketing  
Marketing Strategy  
Promotion and Advertising  
Sales Minded  
Image  
Customer Relations  
Public Relations  
Relationship Building  
Relationship Sales  
Trust Building

## Introduction

Marketing is often described as an action that a person or organization performs to acquire business or sales. In this situation, the marketing consists of direct marketing, networking, telemarketing, defining one's market place, entertaining prospective clients, understanding the needs of your customers and the like.

Marketing, however, can also be seen as an 'attitude'. While the action might not change, the attitude that accompanies those actions can make a huge difference in the success of marketing. Characteristics such as respect, personality, keenness and behaviour become impressive components of marketing. Furthermore, personal composure, positivity and confidence are fundamental traits in developing a marketing attitude. On this level, marketing becomes an organization wide orientation towards improving and maintaining an image and building a clientele based on relationships and meeting needs, rather than sales.

## Marketing in Event Management

In event management, marketing plays an important and dual role in the success of an event. As described above, action and attitude constitute successful marketing. It is these two components that expose and create an image to the public – specifically the target audience.

The marketing of an event can occur in several ways. The following are a few of those ways.

1. The use of positive media coverage to generate public relations.
2. The use of sales and promotions with affiliated organizations.
3. The use of direct corporate and business marketing.
4. The use of advertising by different media.

Each of these is then enhanced by an organizational altitude. This organizational attitude reveals a desire to maintain positive media exposure, business and client relations and effective advertising. It also reveals the attitude of being a professional, customer centred and attractive organization. This, in its totality, is the beginning of establishing a public image for an organization or event.



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In event management, the ability to manage resources in a way that can result in solid marketing and a sharp image is vital. It is paramount in gaining public support, generating pride within organizational ranks and producing a quality product. Marketing is very much an aspect or characteristic of an organization and not just a task or activity that is performed by an organization.

### **Marketing Strategy**

A marketing strategy is a set of policies, objectives and standards that encompasses all aspects of an organization's orientation towards planning, implementation and evaluation of marketing. The strategy is a planned systematic process that prepares and guides the marketing team in developing, promoting and selling goods and services. Furthermore, the marketing strategy is a constant evaluation mechanism – beginning with a SWOT analysis and ending with post production evaluation. The following is a schematic of a marketing strategy and reveals the 10 – P's of a marketing strategy.

The upper section reveals the preparation analysis and planning components of the strategy. The middle section shows the major considerations of an approach to marketing goods and services. The bottom level outlines implementation and evaluation of the marketing strategy.

### **Preparation**

Perhaps the most important phase of a marketing strategy is that of the preparation for strategic planning. This initial stage must be accurate in its results or the rest of the strategic process will be affected. The preparation phase consists of 3 major functions: studying the market, the organization and creating an organizational sub-structure that will be able to plan and conduct marketing.

Firstly, market research and analysis is performed. Specifically, this involves studying the target group of a product or service. The research process is very detailed and far more complex than we will discuss in this course. In a nutshell, market research addresses the following questions.

1. Is there a need for this product or service?
2. Will the public be interested in this product?
3. Can we market the target audience?
4. At what cost will the public participate?
5. What is the probability of success?
6. Will other organizations participate?
7. What need are we addressing'?

The second step in the preparation phase involves conducting an organizational assessment – a SWOT analysis. This type of analysis brings together external market components and internal organizational components to help determine the feasibility of marketing a product. Essentially, the SWOT analysis studies the present situation of the market and the organization, and develops a realistic planning foundation. SWOT is an acronym for strengths, weaknesses, opportunities and threats. Strengths and weaknesses refer to organizational considerations. Opportunities and threats refer to external considerations. The following is a schematic that describes how a SWOT analysis might be conducted

Effectively, the strengths, weaknesses, opportunities and threats are filtered through the organizational goals and objectives to create a realistic situational snapshot. The following are some of the relevant issues that are evaluated by SWOT.

**Strengths and weaknesses of:**

- Financial resources of an organization
- The knowledge available to the organization
- Facilities available
- Time availability, human resources and productivity

**Opportunities and threats of:**

- Competition in market place
- External resources, contacts or associates
- Market demand
- Organizational image in public

All of this information is then used to determine project feasibility. If it looks unfavourable, the project might stop at this point.

**Journal – Exercise #1**

The applications of a SWOT can be used as an evaluation tool, a decision making guide or even a reality check. The following reflective exercise will help you understand a SWOT analysis and reveal its flexibility.

The most important skill in performing SWOT is the ability to brainstorm ideas. Take a couple of moments to think about yourself. Think about the first chapter of this course. What did you learn? What are you strongest or best traits?

Now think about what others see in you. What are your strengths? What do you enjoy doing? What are your weaknesses? What do you avoid or hate doing?

Take a moment to write these thoughts in your journal. Furthermore, make a chart so that you can compare your strengths and weaknesses.

Now place yourself back into your own position but remove all previous learning in your life, so that you are observing the environment or atmosphere around you without bias. What are the opportunities that you can see around you, such as family or friends? How are these things opportunities? What things, that are external, are threatening to you? Why are they threatening?

Continue writing your feelings down in your journal. Make a chart of the opportunities and threats. Place the two charts side by side. What do you notice? Do the opportunities and strengths match up? Do the weaknesses and threats seem insignificant or overwhelming? Compare the charts to discover your benefits, your preferences for behaviour and your direction for the future.



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The final component of preparing for strategic planning is to create an organizational sub-structure to begin planning and implementing the market strategy. The process involves outlining the overall jobs that will need to be completed, such as creating a sub-committee from the board of directors. Other components such as establishing the communication process and maintaining direction of the project, to meet organizational mandates, are also a function of the preparation phase. For the remainder of the marketing strategy, the event manager's role will become increasingly demanding and important to the success of the marketing strategy and the special event.

## **Planning**

The second phase in a marketing strategy is the initial planning stage. Built upon the foundation established by the preparation phase, planning is performed on an organizational and implementation level. There are 3 levels of planning at this point – objective setting, policy and procedure development and organizational structure and strategic processes.

Objective setting both links the previous phase to the present phase and links the organization to the present marketing project. The findings of the market research and the organizational mandate are both reviewed. From this, the needs of the participants and public are used to create a strategy mission, goals and objectives. The strategy mission and goals are underlying guiding statements and principles and the objectives are task and performance oriented guidelines. In strategic planning it is important to recognize the flow from 'needs' to 'mission, goals and objectives.' Furthermore, this progression is essential to sound decision making for the remainder of the project. It is vital that this planning be solid so that there is no question of the direction of the marketing team.

Thus, key components to consider when planning at this level are: customer satisfaction, resources allocation, needs orientation, organizational mandate and public relations. Objectives based on these components are put into action by qualifying them in terms of place product, price, promotion, presentation and people (The next 6 phases of a marketing strategy).

After objective setting, the process of policy and procedures development begins. Some organizations have a body of text that may already exist, however, in some cases a document might have to be developed. This planning process is necessary to further solidify the direction of the organization, and to reveal standards and procedures that need to be consistent, while marketing.

Furthermore, policy will guide the organization and its members in developing and implementing a marketing strategy and its sub-strategies: place, product, price, promotion, presentation and people. Policy writing will often be overseen by the event manager and the Board of Directors. Policy and procedures would include information about:

- Constitution and bylaws
- Human relations
- Communication mechanisms
- Sales and production
- Customer relations
- Rights and obligations
- Organizational structure
- Job descriptions

Based on the policies and procedures that have been established, the final step in the planning phase is to define the organization of the marketing team, its structure and processes, and implement the policies and procedures. With all of this in place, we can move to the major components of the marketing strategy. Specifically, those components relevant to the goods and services that are being marketed. The following components, in the Particulars phase, define all aspects of the marketing activity. The link between the product and the people (all People) is established in this phase.

### **Particulars**

The product, place, price, promotion, presentation and people of a marketing strategy are all vital components to planning a sound market plan. Specifically, creating the 'link' between the product and the people or participants involved. This section reveals marketing information that is used in planning and implementing the direct actions of marketing a product. As you are reading the next 6 components, try to think of a recent marketing experience from the media and identify, in that experience, some of the particulars.

### **Product**

Often the first 'particular' that is considered is that of the specific product being marketed. It is important to have a good clear understanding of your product before attempting to plan. This phase is used to define the product. This can be done by answering the following questions.

1. What type of product are you marketing?
2. Specifically, what is the product?
3. What is the need for this product?
4. What are the tangible benefits (for the customer) of the product?
5. What other benefits will a consumer receive, for example satisfaction?

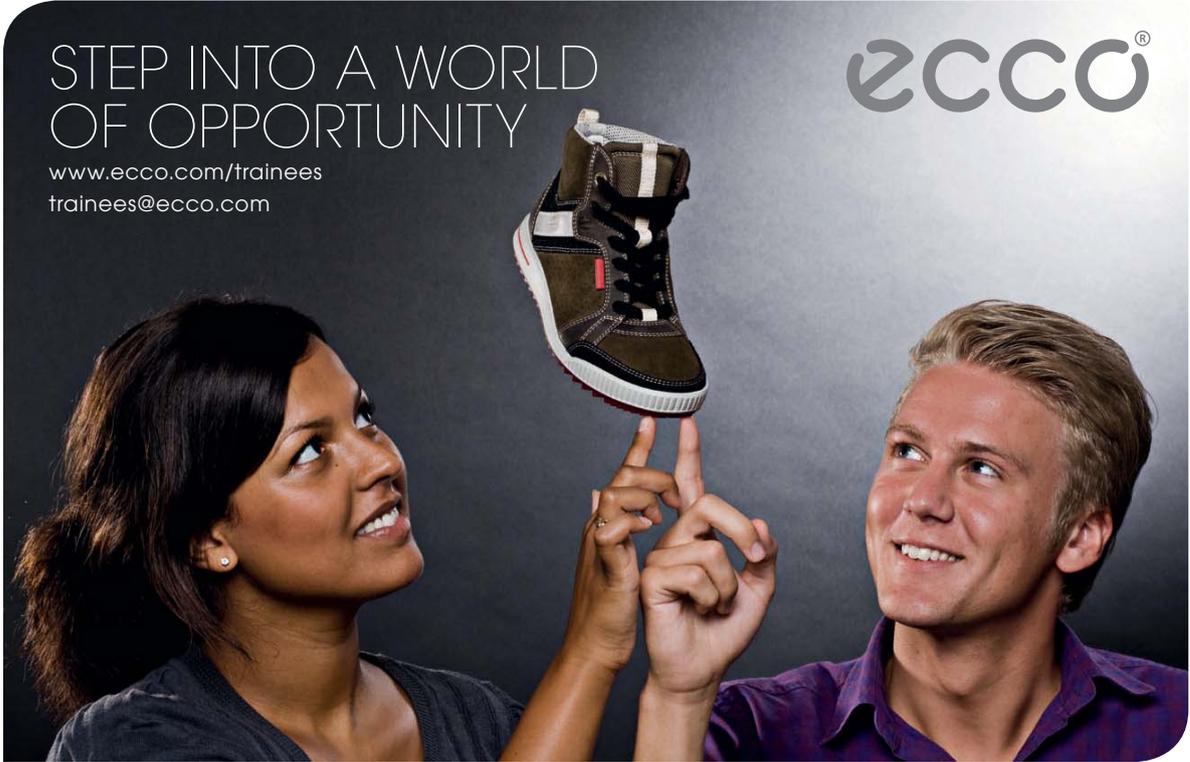
This phase should disclose the information the consumer will need to make a decision to purchase. The important component to providing this information is describing the benefits. The connection between the product and the consumer will be an important part of a successful marketing strategy.

### Place

In determining location of a product or service, there are also tangible and intangible benefits. These benefits are instrumental in defining the relationship between the product and the consumer, and the organization. In this case, the location effects both the consumer and organization – some in a positive manner, others not. The following checklist will shed some light on these components.

1. Is the location comfortable?
2. Is the location convenient?
3. Does the location offer the resources needed by the organization and consumer?
4. Does the location have symbolic or nostalgic value?

The role of the marketing team and event manager is to determine the cost benefit analysis of the location. This ultimately will affect the success of the project. The event manager must be able to find a balance between satisfying the consumer needs and organizational needs, at the same time putting the consumer's needs first.



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## **Presentation**

The Presentation phase deals with the overall appearance and delivery of the marketing strategy. This particular component of the marketing strategy is descriptive of the organizational attitude that mixes with action to yield a successful marketing strategy. Specifically, the presentation or image that a marketing strategy portrays should be characteristic of the company. The marketing strategy is a vehicle for delivering a certain image to the public, customers and participants. In this image information about the company, its orientation to the purpose of this marketing or a special event and the role of the organization are conveyed.

In marketing and event management, an organization can either display an image that the company has already displayed to the public or it can cast a new or more positive, serious or charitable image. In the presentation phase of event marketing, the organization presents an image that is fitting with the marketing strategy of the project. This is an issue of organizational agenda and needs to be carefully planned.

## **People**

In marketing planning there are two major groups of people that we should consider – affiliates and clients. Affiliates are any person that is working directly or indirectly to plan, organize, market, execute or evaluate a marketing strategy. This group includes employers, employees, outside organizations, volunteers, administrators and support staff. The second group of people are clients. This includes prospective clients or customers, present or past customers, and the target audience (as outlined in the Preparation phase). People are our single greatest asset and resource. Both affiliates and clients are worth considering. The importance of studying the client group goes back to the preparation phase and market research of the target audience.

## **Price**

In considering price in a market strategy, there are two main issues. Firstly, the cost-benefit analysis – a balance sheet of financial considerations. The cost-benefit relationship can be calculated in several ways, such as looking at the return on investment of a project. Some leading questions in cost-benefit analysis are:

1. Is it worthwhile?
2. Is the project, product or special event worth administering?
3. Is there either monetary profit or another benefit for the organization?

This is, however, partially dependent on the second consideration which is the buying price of the product. The question that needs to be asked in this consideration is:

1. Can the product be offered at a price that will make it attractive to customers?

The calculation of cost-benefit is a vital component to a marketing strategy and to the success of an organization.

### **Promotion**

Promotion is the advertising, publicity, public relations, literature and media that is involved in marketing. It is a large component of the 'action' that occurs in marketing and perhaps requires the greatest amount of planning. The reason that it is placed at the end of the Particulars section is because promotion is dependent on the previous phases. Each of the particulars phases collects information that is used before promotion can occur.

There are 3 basic components that must be present in promotion. Firstly, there must be information provided that describes, shows or presents the product that is being marketed. Secondly, there must be information about the host organization or sponsoring organization. Lastly, there must be some provision that outlines the benefits that the client or customer will receive from the product. These 3 components make up the foundation for promotional material.

#### **Journal – Activity #1**

The consideration of Place, Product, Price, Promotion, Presentation, and People constitute the body of a marketing strategy. These aspects are present in most successful market strategies, in some form or another.

Choose a marketing situation that you are familiar with, have been exposed to or worked on.

Try to identify each of the above aspects or components. Where did it take place? Local, National, International? What was being marketed? How much did it cost? Was a positive image of the organization portrayed? Who was involved?

In your journal list each aspect – Place, Product, Promotion, Price, Presentation and People. Write a one to two line definition of how each was portrayed in the marketing strategy.

### **Marketing Action**

#### **Production**

Once the organizational foundation is set and the particulars have been developed, the planning component of the marketing strategy is complete and we can move to the next phase – Production. This is not the production of the product or special event, but the production of the marketing strategy. This implementation phase starts the 'action' of marketing.

At this point, the marketing team changes theory into practice. In this action phase, the event manager's role would primarily be to establish contacts, clients, provide leadership and develop the organizational image. This responsibility is demanding and challenging and is directly related to the success of the project. All of your personal traits need to be aligned to reveal a positive attitude, the organizational image and develop personal relationships with all participants and clients. A marketer needs to be able to sell the product, idea and image to prospective clients. In many cases a clear understanding of the rudiments of the marketing strategy and a developed marketing attitude are the most important factors in success marketing.

### Post-Production

The final phase of a marketing strategy is the Post-Production evaluation. Although this is the last phase in this paper, it is not limited to the last phase of planning. Evaluation occurs through out the project to help focus and give direction to planning. It is useful for helping to improve organizational effectiveness. It is important for an organization to be a learning organization. Not only do the people in the positions need to constantly monitor, evaluate and learn from experiences, but the organizational culture, image and dynamics can also benefit from evaluation and learning.

Organizations use many tools for evaluating and monitoring progress. Interviews, questionnaires, forums, and feedback mechanisms are used frequently. The following is a checklist that could be used to help in developing a marketing strategy.



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## Marketing Strategy Checklist

### Planning

- Who is the target audience?
- What are the strengths and weaknesses of the organization?
- What are some of the external challenges that you might face?
- What type of organizational structure will be needed?
- What are the organization's goals and objectives?
- What type of organizational policy will have to be created?
- Who will the Strategic marketing team consist of?

### Particulars

- What is the product?
- Where will you be marketing it?
- What type of presentation or image will you be conveying?
- Who will be involved in this marketing process?
- What will this product cost to deliver and purchase?
- How will you be promoting this product?

### Marketing

- What type of action will be taken to market this product?
- What type of people will be needed to market this product?
- How will you be monitoring the marketing process?
- How we you evaluate your success?

#### Journal – Reflection # 1

You should now have a general understanding of the marketing process and the rationale behind marketing. The following reflective activity will help develop your critical thinking skills.

Try to pick an existing marketing campaign that is familiar to you, for example a soft drink product. What were some of the particulars of the marketing strategy? Can you isolate the components that we looked at?

What is your attitude towards that marketing strategy? Did you enjoy it? What did you like or dislike? After purchasing the product did it meet the expectation that the marketing strategy portrayed? Do you feel you got your money's worth?

What would you change about the strategy? How would you change it? What was the image that the company was trying to display? Was the marketing strategy unethical or did it conform to socially acceptable standards?

# 7 Fundraising

## The Learning Outcomes:

1. To provide a general understanding of the function of fundraising in event management.
2. To outline the planning consideration of fundraising.
3. To reveal the dynamics surrounding donation giving and solicitation of donations.
4. To develop an awareness of the personal characteristics used in fundraising.

## Goal:

To develop an awareness of both the planning aspects and personal sides of fundraising.

## Key Words:

Solicitation

Donation

Sponsorship

## Introduction

Just about everything we do costs money. That is why fundraising has become such an integral function of event managers. In the past, fundraising consisted of knocking on doors and cake sales. In the last couple of decades however, fundraising has become big business. Not only has the amount of fundraising been increasing, but the amounts collected are increasing. It should be mentioned that there are a variety of factors that have contributed to these changes, such a government spending cuts and public awareness issues that we will not be discussing. The most drastic changes, however, have occurred in the level of academic and industry interest in fundraising issues. The amount of information available on related topics is staggering and the study of people, solicitation and donating has flourished.

This chapter deals with some of the above issues. As an event manager, an understanding of fundraising is vital. The ability to organize fundraising and be able to represent your organization in this fashion is in great demand. An understanding of people, donation giving and the art of solicitation is fundamental and the characteristics needed to perform these are desired by employers. As you read this chapter, think about your personal orientation towards this aspect of event management. What personal attributes does it require and what do you have to offer?

## The Purpose of Fundraising

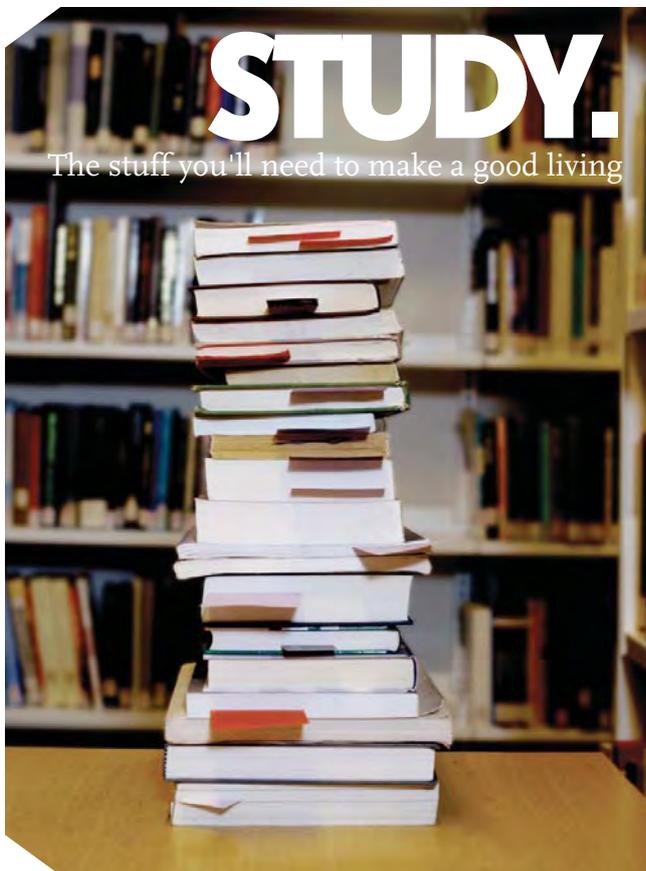
How many examples of fundraising can you think of? I am sure you could draw up quite a lengthy list. The reason for this is because fundraising is widely used to generate assets for organizations.

Why is fundraising performed? Again the list is endless. It can be done to collect money to give to charities, to use to pay for community services or to help the less fortunate. For the purpose of this paper, there are three main purposes or occasions for a fundraising activity. In the first instance, fundraising is done to collect assets that can then be used internally in an organization, to enable continued functioning or meet their organizational mandate. The second instance involves collecting money for external use, such as donations. In these two instances, fundraising is done as a secondary activity of the organization. The third purpose is when fundraising is the primary activity of the organization. In this case, a fundraiser is planned for a specific reason and the money, less fundraising expenses, is donated for that reason.

### Planning in Fundraising

For the purpose of this chapter, we will look at planning in fundraising within the strategic planning context presented in Chapter 3 and keeping in mind all of the purposes of fundraising discussed above. We will present a generic process that could be used in any type of fundraising. From this we should gain insight into fundraising that is performed as a secondary function of an organization and fundraising that is performed as a major special event (primary function).

The above is a schematic of a generic planning process. As you can see the process is rooted in the strategic planning process and is guided by organizational objectives. Furthermore, the body of the process addresses the major planning considerations that this course is built on. The following activity will help you develop an awareness of the rudiments of the fundraising process.



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**Journal – Exercise #1**

Before starting this exercise it might be helpful to read over the section in Chapter 3 about Strategic Planning and reflect on all of your learning thus far.

Firstly, choose a fundraising activity or event. Think about this project on a general scope. Focus on the major functions or planning activities that would be involved.

Secondly, develop a general timeline to coordinating this project. Think about the fundraising process. Write a couple of sentences in your journal, outlining some of the major consideration of each planning activity of the fundraising process. Try to think of any other planning activities and consideration that might be specific to your project

Finally try to think of a way that you would be able to evaluate the success of your event.

While it is difficult to do justice to the complexities of the fundraising process in such a short format, there are systematic processes that can effectively shed light and summarize fundraising activity. The following are some considerations or questions that might be asked about each activity or planning component of the fundraising process or special event.

1. What and why is the activity being performed?
2. What is the return on investment (ROI) of the activity? Expense VS Income.
3. What role does the activity play in the event?
4. How can we justify the expense of the activity relative to other activities?
5. What is the priority of this activity?
6. How can we evaluate and control this process?

Can you think of any other considerations that are missing that should be a part of this process?

**Sources of Funds**

This consideration is vital to planning the what, where, when, why and how of fundraising. A good rule of thumb when fundraising is that “funds can come from almost anywhere – obvious or not.” This type of attitude will help a fund-raiser see more opportunities and become more successful. On an institutional level, funds can originate from Federal/National, Provincial/State or Municipal Governments or branches.

Funds can also come from private sector businesses or the non-profit sector, from investments, sales or events, sponsorship or from planned bequests from estates. The important thing to remember is that, in order to be successful, in each case fundraising must occur through specific and directed planning.

## Evaluation

As in each major component of event management a constant and vital activity is that of evaluation. In fundraising there are several areas of evaluation that should be considered. The purpose of the evaluation is so that the participants and organization can learn and improve. For this reason, it is important to look at aspects and procedures that we can learn and improve on. If we looked at the balance books (money) to evaluate, we would only learn that we failed or succeeded. But, if we look at the process, the plan and the participants, we can isolate our successes and failures in such a way that we can learn from them. In fundraising the following are some of the areas that might be evaluated.

- Organizational communication
- Client relations and satisfaction
- Budget planning
- Planning procedures
- Execution of the event
- Participant problems solving

Can you think of any other areas that can be evaluated from which we can learn from?

## The Personal Side of Fundraising

Why should we consider the human aspects of fundraising? Firstly, understanding the human aspects is integral to successfully performing all other aspects of fundraising. Secondly, the process and success of fundraising is grounded in human behaviour. Thirdly, all of the participants in fundraising are humans. For these reasons understanding the personal side of fundraising is vital to the entire process.

The following sections are oriented to familiarizing you with the reasons why or why not people might give donations at fundraisers. Furthermore, the process of solicitation is established. These components will be rooted in behavioural terms and lead the learner in discovering the personal characteristics that one might need to perform such tasks.

### Journal – Reflection #1

Take a moment to reflect on some experiences that you have had that has involved fundraising or donating. Specifically, think about a time that you have been solicited for money.

What types of organizations do you typically give to? What type of fundraising is performed during this solicitation? Write down a few sentences that describes this experience.

What types of things or interests did you relate to or were you willing to support? What areas are you not willing to support?

What was the fund-raisers technique in solicitation? What part of this process appealed to you? Which did not? What aspects of this or another solicitation experience did you hate?

## Why People Give Donations

As a fundraiser, it is important to be aware of the reasons why and importance of donations. The necessity of this awareness is deeply rooted in human behaviour and a customer centred approach to event management. Similar to meeting the needs of a customer, an event manager must also meet the needs of those who donate.

The motivation to 'give' exists within an exchange system. Within this exchange there can be several outcomes. Joseph P. Mixer (1993) suggests that the exchange process is a "one-way transfer of assets from party A to party B without any economic goods returned by B." Although the exchange seems a little one sided in economic terms, a balanced value exchange must exist. If it does not, then it is less likely that an individual would donate. The exchange can involve money or goods in return for personal growth, recognition etc. Mixer also suggests that there are both internal motivations and external influences that characterize why people give donations.

These internal motivators and external influences are the needs that donators desire in return for donations. Furthermore, these needs, when provided, complete the value exchange process that occurs when a donation is given.

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## Why People Do Not Give Donations

It is important to realize that there are areas that we can ethically discuss and act upon, as fundraisers, and ones that we can discuss but might not want to act upon. When trying to solicit donations, we might simply not have the right to actively address certain issues. The reason lies within the nature of the relationship between the two parties involved in the fundraising exchange. On an elementary level, there are two parties involved in the fundraising value exchange process: the fund-raiser and the donator, the receiver and the giver.

As a fundraiser, we are not in the business of judging people. We are in the business of helping people. Donating is an entirely personal choice and is motivated for specific reasons. The reason that it is important to be aware of issues that can and cannot ethically be addressed when fundraising is that it reveals the necessity for an acquired attitude toward fundraising, beyond customer service. Specifically, it is imperative that the needs, emotions, feeling and concerns of the donator are placed ahead of any organizational need.

Research into the reasons why people do not give donations shows that there are areas or reasons, which span from donor related to fundraising organization related. The main research questions deal with why people don't give and why organizations do not receive. Joseph P. Mixer (1993) identifies general reasons why people do not donate. Furthermore, he groups the reasons into categories that deal with the donor, the fundraiser and the fundraising organization.

## Asking People for Money

This section brings the content of the previous chapters together to establish a process for soliciting money. For the purpose of this paper, we will limit our discussion of asking people for money to face-to-face solicitation. Furthermore, two scenarios will be used as examples. Firstly, the idea of one-on-one community based solicitation, for example canvassing, and secondly the idea of a well-known individual soliciting the public, for example a charity dinner. In both cases, the same general process of solicitation is followed. Although, the two fundraising scenarios seem entirely different, a communication process occurs that is the same.

Mixer (1993) suggests that the 'Asking Process' consists of 3 essential steps.

1. Prospect cultivation
2. The act of asking
3. Completion of the social exchange

In the cultivation of the prospective donor, the donor is made aware of the purpose of the fundraiser or who is fundraising for what reason. In some cases the donor might have an interest in supporting an organization's beliefs, services or mandate. Mixer (1993) also suggests that two assumptions must be made at this step. Firstly, if the prospective donor is unaware or not interested in the organization or services being supported then there is a less likely occurrence of donation. But, secondly, if the needs of the donor are identified in this step it is possible then to use that information to create interest and improve the chances of donation. Once the linkage is made between needs and interests a value exchange relationship can develop. The participants – donor and organization – share a cause. This relationship sets the stage for the next step in the solicitation process.

The act of asking for money is the most delicate step in the solicitation process. Not only must the prospective donor feel an interest in the need for donation, but, must also feel the urgency for the donation. Donating must exist on an emotional level. The one-on-one solicitation situation, up to this point, may take only a few moments. Yet on a larger scale, in special event fundraiser, this could take much longer.

The completion of the social exchange occurs when the donor has felt that the value exchange has taken place. On a one-on-one level, the donor could receive this satisfaction from something as simple as a 'thank you' or a pin that says: 'I donated to...' On a larger scale, community recognition or a tax incentive could provide the needed closure.

**Journal – Activity #1**

This activity will help develop your interpersonal skills pertaining to fundraising.

Choose a fundraising or solicitation situation that you would feel comfortable in. Review the steps in the 'Asking Process' and consider each step in your chosen situation.

Write a description and dialogue of this situation. Focus your thoughts on identifying the donor's preferences and on how it would be appropriate to recognize that donor.

### Personal Characteristics

It is difficult to qualify what exactly a fundraising attitude consists of; it would embody some of the following traits:

- People oriented
- Personable
- Patient
- Honest
- Persistence Listener
- Attentive

From your readings and reflections from this course and of the functions of fundraising, what do you see as a fundraising attitude? Do you possess these characteristics? Can you develop them? Before answering these questions it is important to remember that there are many personal techniques in fundraising. Furthermore, one is not necessarily better than another. In fact, the most important aspect is the person performing the fundraising. Although, the above personal characteristics are important, they only form a characteristic foundation that other more pertinent traits are built on.



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# 8 A career in Event Management

## The Learning Outcomes:

1. To provide a summary of event management.
2. To provide additional information about the career of event management.
3. To provide further resource information to the learner.
4. To provide first hand dialogue, in the form of letters, from practitioners.

## Goal:

To provide additional information and resources, to the learner about the career of event manager.

## Introduction:

Now that we have studied the 5 major components of event management, we can discuss the field of event management. This will allow us to piece together a true picture of event management and we will discover why it is important to consider the elements of event management on both a practical and behavioural level.

The final chapter of this course will wrap up many loose ends. It will provide a recap of some of the personal characteristics and behaviours that were identified in the course. It will also introduce the requirements, standards and certification in the event management industry. Finally, it will provide additional information in the form of resources and letters from practitioners in the field of event management.

## Event Management

Event management is not only a process; it includes a considerable amount of internal and external considerations. These considerations have been categorized into 5 groups – the functions of event management. While a definite event planning process was identified, the functions of event management do not occur in such a linear fashion.

**Journal – Exercise #1**

The following exercise is meant to help you realize where the functions of managers are used in the event planning. Using the following system, write letters beside each step of the planning process that identify the functions that should be considered when planning. Use P = planning, H = human relations, C = catering and food services, M = marketing and F = fundraising. The following is the event planning process and functions. What do you notice about your findings?

1. The idea
2. Establishing goals and objectives
3. Resources assessment
4. Proposal
5. Event planning begins
6. Plan evaluation process
7. Plan human resources
8. Plan externalities
9. Plan specifics
10. Plan marketing strategy
11. Review plans
12. Begin marketing
13. Verify details
14. Execute event
15. Evaluate success

Your results should be indicative of the complexities in event management. All of the functions of event management should be considerations in almost all of the steps of the planning process. The functions of management are actually groupings of related knowledge and skills. The interconnectedness among the various aspects of event management shows that the planning process cannot be segmented. Event management is not series of steps, but, a continual flowing of coordination. If we consider event management in this light, we can more clearly see that there are special characteristics and skills that are needed to successfully orchestrate it.

**Personal Characteristics**

Throughout this course you have be prompted to examine your own personal characteristics and consider those that are important to the event management position. In the first chapter 10 employment preferences for event management were identified. These characteristics are only a fraction of the total attributes that are required for a career in event management. Through our examination of that major function of event management and through your journal reflection, it is evident that event management requires a special type of person.

**Journal – Reflection #1**

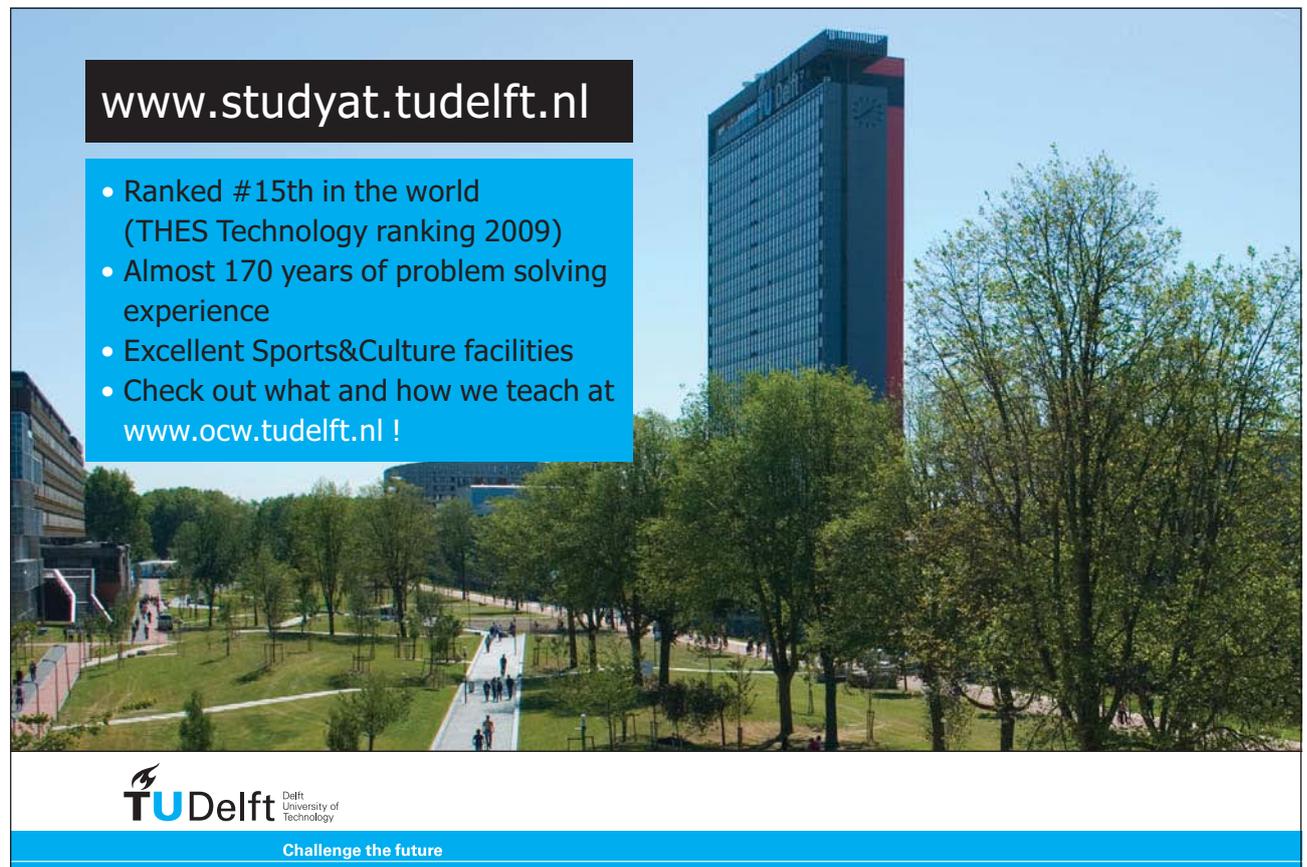
Reflecting on your learning from this course, what are your feelings towards the career of event management? Write a one paragraph narrative explaining and justifying your feelings.

## A Career in Event Management

### Requirements

Event management is becoming an increasingly more controlled industry. The professionalism is growing and many employers will require proof of professional status. Post-secondary education has become a minimum for employment in the event management industry. Some employers will require a university degree, while others will prefer a college diploma. Some employers are concerned less about the area of your education and more with your skills, while others require a specific education.

In the industry, there are event managers from every conceivable background because event management occurs in so many different industries. In this diverse kind of field, event managers are being challenged to maintain their professionalism and credibility, on an industry level. To combat this challenge the industry use standards and certification to maintain professionalism.



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## Standards

Standards are baseline performance expectations that are outlined by governing bodies in industry, such as tourism councils. Standards are established to help event managers on a professional level, to maintain or enhance skills and job performance and achieve public recognition. Standards in the event management industry often define expected performance, of staff and managers, in the following areas:

### Job related skills, such as:

- Interpersonal skills
- Product knowledge
- Customer service

### Professional skills, such as:

- Planning
- Knowledge of legislation
- Knowledge of related areas such as food services
- Organizational management
- Human relations
- Finances

### Industrial knowledge, such as:

- Marketing and market research
- Staff training and development
- Organizational performance and evaluation

## Conclusion

Is this for you? Do you want to know more, do you feel like this is something you would like to pursue?

Drop me an email and let's talk next steps – [jason@JasonAllanScott.com](mailto:jason@JasonAllanScott.com) and don't forget to listen, subscribe and share The GuestList Podcast

Until then here is some info on the society in the UK that can link you with great resources and other event professionals – The Special Events Society UK and Ireland – <http://www.isesuk.org/membership/benefits/>