

The Reluctant Event Planner's Survival Guide



‘What’s so stressful about planning a conference? I organised my nephew’s 4th birthday party, and he loved that.’

‘Can’t you just make a Facebook event?’

‘I’d love your job. You’re so lucky, getting to go to all those parties.’

If you’re gritting your teeth at the familiarity of these phrases, it’s with good reason. Whether you’re an event coordinator, a wedding planner, a conference organiser or in a role where event planning is just one part of your portfolio, chances are the rest of the world thinks you have it easy.

Wrong!

Event coordinator roles are among the most demanding jobs you can have. In fact, according to 2018’s CareerCast.com survey, the only more stressful roles are as military service personnel, airline pilots, firefighters and police officers.

Surprised? That’s fair. Those are frontline services, managing potential crises every day. The consequences of a mistake in that high-pressure environment could be life-changing, even fatal. Event planners certainly aren’t facing those kinds of high stakes - but a job doesn’t need to have literal lives depending on it to be stressful.

So what do all these roles have in common?

They all share a weight of expectation, placed on a single set of shoulders.

You are the one who will be asked questions – and expected to always know the answers.

You are the one on the scene, whose initial reaction can make the difference between success or failure.

You are the one assumed to have authority.

The buck stops with you. And while a lunchtime kitchen power cut and 200 hungry delegates isn’t a riot or a warzone, it’s still a tough situation.

Even when things are going well, you still have an extraordinary number of tasks to keep in mind when pulling an event together.

If you find it challenging, it's time to stop being hard on yourself. You might have stepped into an events role by degrees, and feel completely overwhelmed. You might be an event planner heart and soul, who has always thrived on that Everest of a workload – but right now you're feeling a little burned out.

Whatever the reason you're feeling reluctant, help is at hand. This survival guide is here to walk with you through the process. First, you'll have the opportunity to identify your strengths, and which areas of the job you find most tough right now. Part Two will give you a huge portfolio of tips, tricks and alternative ways of thinking to help you tackle each and every area, from harnessing your personal strengths to effective measurement of ROI.

Ready to reignite your event planning passion? Let's go.

PART ONE

Why your job is so tough



When you want to succeed, it's hard to be analytical. When you really care about doing a good job, it's hard to be dispassionate. And when it comes to self-analysis... well, you're only human. Most of us would rather focus on the things we're good at and the stuff we enjoy. Identifying what's not going so well? Yeah, let's skip it.

Here's the good news. Identifying and acknowledging the challenges in your work life means giving yourself the opportunity to identify and acknowledge the places where you're a rock star, too.

You won't feel like everything on this list applies to you – to your role, or to you as an individual. But as you read through Part One, make a mental note of the areas where you feel you need more control.

Before we get started, take a moment to think over how you feel about your role: in general, or perhaps in relation to a particular upcoming event you're finding daunting.

How confident do you feel in your own abilities right now?

If your confidence isn't great, don't sweat it: you're reading this guide to help you with that.

If your job is currently at the upper end of the tough scale, that's ok: again, that's why you're here.

And if identifying one or both of those things makes you feel miserable: you're not alone.

Long hours

Let's face it: it's probably the most challenging aspect of your role.

The workload is extreme. When all decisions start or stop with you, it's easy to find yourself allowing work to eat into your personal time.

You want to do the absolute best for your customer or client, and that's great. But that might mean you make promises you know you shouldn't: like always being available to pick up the phone; like being happy to revisit a completed task to get it 'just right'.

And that's before you factor in the events themselves. An evening party or a multi-day conference can leave you exhausted.

You might thrive on being busy; most people in the events business do. But still have only 24 hours in a day. There are limits on what's realistic for any individual to achieve before details get missed – and your personal life suffers.

Lead times

You're unlikely to ever be working on a single project at a time.

That means managing multiple individual workloads – all demanding your attention whether the event takes place tomorrow or in six months' time.

A short lead time on an event can mean scrambling to use your best contacts, calling in favours, and choosing where to compromise when the perfect venue is already booked, or the best time to attract attendees is past.

A long lead time gives you more opportunities – but they need management over an extended period.

Either way, you will often find yourself juggling delivery, and planning the next big thing.

Event management software

Your event management software should be working for you. But in most workplaces, you'll have inherited a system, not chosen one for yourself. It may not allow you to work in the way that you find most practical, or be tailored to the type of event you're trying to run.

There might not be an event-specific package for you to use at all, in which case the responsibility for account monitoring and data management is all on you and your processes.

Even if you have a system that works well, there may be other staff using manual processes which could be speeded up or streamlined. And when things go wrong, tech-wise, you need a back-up team of tech support that really understand what your needs are.

Budget

Financial stress can be some of the most challenging to handle. In an ideal world, you'll have a set budget to work to, and be able to immediately compartmentalise essentials, before seeing what's left.

However, mistakes happen. Plans fall through. Numbers fluctuate. If you're not experienced with managing a sprawling budget or prone to indecision, you may suddenly find yourself with spiralling costs and no sign of an end.

Alternatively, you might be faced with rigid financial constraints that leave you with no room for creativity or innovation.

Neither scenario is going to fill you with passionate enthusiasm for the task ahead.

Pressure of proving ROI

You might have the benefit of inheriting an event that's been run multiple times before. Many conferences and business events are semi-regular or annual occurrences, with all the positives that provides: leads on a repeat audience, a checklist of past successes (or suppliers to avoid), and a financial track record to show where improvements might be made.

What's less positive is the resulting pressure of expectation. Your costs will have risen, thanks to the impact of currency fluctuations and rising food prices. In a competitive marketplace, you need to do more than simply repeat the previous year's efforts. That means doing more with less.

Throw in the challenges of measuring ROI in an environment filled with valuable intangibles like networking and brand impression, and it's no wonder you feel reluctant.

Unrealistic expectations

There are few things more frustrating than a client who wants a champagne event on a Tizer budget.

Unrealistic expectations don't just involve money, either. You may always hope for a client with a clear vision of their event to help you choose the right venue and suppliers, but not when that vision demands clear blue skies and sunshine for an outdoor party in April.

Remember, it's not just the customer who can get carried away with wild ideas. While it's good to be ambitious, you also need to be realistic about what you can achieve. When you promise you can be in six places at once on the day of the event, or that you can design, order and print 100 extra invitations with a day's notice, you know you're setting yourself up for failure.

Complacency

On the flipside, you need to be wary of your own potential laxity.

‘If it ain’t broke don’t fix it,’ they say. But in events, you have to be proactive. Getting by, or doing it the way you always have: that’s not good enough. Turning up to an expo because your competitors will be there, but with no strategy or conviction: the same.

If you’re an experienced old hand at event planning, your customers may have expectations that exceed your knowledge, or push you out of your comfort zone.

Clients aren’t immune to this tendency, either. Even if you’re ready to think outside the box, a returning customer with no desire to do anything differently may rapidly find themselves with slower sales than they’d hoped.

Past mistakes

If you’re feeling a lack of confidence, it may be down to past performance.

If you feel you’ve underachieved with event planning in the past, it’s not easy to pick yourself back up, unbruised. Perhaps you were disappointed in the way you managed a previous conference when things went awry. Maybe your customer was unhappy with the service, or unimpressed by the catering.

Whatever metrics you use to measure success, it’s likely that you’ll be paying closest attention to areas where you feel you’ve failed in the past – and placing additional pressure on yourself to turn those around.

How are you feeling about your job now?

Chances are more than a few of those rang true. Which means it's time to give yourself a round of applause, for getting up every day to get the job done. None of us are superheroes all day long: even Spiderman gets to be nerdy kid Peter Parker sometimes. So give yourself some credit. You're powering through despite the challenges.

But that doesn't mean this status quo should stand.

There are colossal disadvantages to working like this, with extended hours and endless frustrations – to your business, and to you.

Why to change things up

Don't underestimate the impact of constantly scrambling to catch up.

Your stress levels will affect your sleep patterns, your health, and your social and home life.

But it's not just you who will suffer as a result. There's a negative knock-on effect on your staff, too. When you're holding all the cards, any lack of oversight on your part will impact their ability to do a good job. If you're trying to do six tasks at once, your lack of visibility means they're rarely in a position to come to you for help.

Poor communication, forgotten steps in your planning and delivery, and inconsistency in your rushed decision-making will all take their toll.

Ultimately, the result is a poorly-delivered event. That means unhappy attendees – and another set of frustrations and disappointments.

So: you've identified what's wrong. You know why it needs fixing.

Now let's get to the good stuff: how to make it better.

PART TWO

How to make it better



In Part One, you spent valuable time identifying which aspects of the job are making your life tougher – and, hopefully, a few potential problem areas where you’re nailing it regardless.

Part Two is where we turn things around. These tips will boost your confidence, kickstart your enthusiasm and, quite simply, make your life easier.

Not every piece of advice here will match your needs perfectly. Some of it you’ll know already. Some might sound impractical for you, or too much like more work. You might even be resistant to changing things, even if you can see there might be long-term benefits.

But you’re not reading a survival guide because you already know it all. You came here for help. So read on with an open mind. Even one or two small changes can make a big difference.

Do stuff that works

Sounds simple, right?

But you'd be surprised how often the beginning of a planning process misses an essential component: goal-setting.

What defines a successful event?

You might think it goes without saying. But do you want to prioritise your financial bottom line, or develop sales leads? Is this an opportunity to build your personal or institutional reputation? Do you need to sell a certain number of tickets, or increase ticket sales from a previous event by a set percentage? Does what happens in six months' time as a result of the event matter more than the experience on the day? How are you measuring those variables?

Clear objectives give you the only possibility of success. Without knowing what you want to achieve, you'll never know if you've got there.

Once you've pinned down your objectives – and the means by which you're tracking them – be smart with the time you have.

'Do stuff that works' means doing the basics brilliantly.

The best way to boost ticket sales and attendance for conferences and other ticketed events is a great website that really communicates your message, accessible across all platforms. Include strong clear calls to action throughout, making it easy and enticing for your future attendee to buy from every page. Foreground your USPs: an outstanding speaker; the opportunity to network with international colleagues; a great location that adds value and the possibility of a leisure stay.

Price your event wisely. Earlybird rates are a great way to pull in attendance from your existing customer base, especially when they feel you're doing something exclusively for them. It's also an opportunity to upsell value-added tickets, with reduced residential rates for early bookers, or discounts on food.

When it comes to your registration form, keep it simple and engaging, no longer than it needs to be.

Follow up with those who have booked via email, ensuring they have access to key information. If it's an event where they'll be staying overnight, be sure they know their best available options. Give them parking information, and help them to links to public transport options and taxi firms. Maps are always well-received. They may be an audience you've already successfully brought on board, but there's value in building that relationship – especially if you can leverage that to bring in more bookings, by offering further discounts or upgrades if they encourage a colleague to attend.

Then reuse that content in blogposts.

If you already have a social strategy that's effective, due the nature of the event or the profile of those involved, use it. If not, keep your time investment in social media light.

Take control of your planning

When your confidence is low, or you've had bad feedback lately, it's hard to get motivated to start.

If you're new to your role, or are building on existing experience with a big step up in terms of responsibility, planning a new event from scratch can feel incredibly daunting.

Whatever the reason for your reluctance, putting it off won't help. If you're overwhelmed at the start, the knock-on effect on other staff, held up by your indecision, really won't help. Neither will discovering you've left it too late to reserve the best venue, or book your ideal catering.

So how do you get past that blank page?

First, break it down into small, manageable tasks.

For most people, writing down a plan reduces stress. Once one vast, seemingly-impossible task is reduced to a series of individual ones, it's much less daunting. It also gives you a far greater sense of satisfaction, as smaller goals can be achieved more quickly and more frequently.

You'll find plenty of event management plans and templates online, to help you structure your thinking.

If you struggle with day-to-day management of multiple tasks and deadlines, there's also plenty of tech to help – for free.

Google Assistant is great for general life-organisation – and it works just as well as a personal event-plan manager.

It responds to both written and verbal commands, making it easy to update on the fly. The 'Your Stuff' tab allows for the scheduling of events and reminders: booking deadlines, or just a nudge to remind you to take a deep breath away from a screen every two hours.

It can be triggered by location as well as time, so you can arrange to send a particular email when you arrive at work, or be reminded to see a particular staff member when you get to the stand.

It'll offer you shortcuts to your photos, making visual social sharing quick and simple. And, of course, it will sync comfortably with Outlook, meaning you can keep distinct calendars united.

It's not the only option out there, of course. Todoist and WeekPlan offer similar services. Or, if you prefer to stick with trusty pen and paper, a Bullet Journal or Passion Planner will allow you to record past achievements and future plans in an uplifting visual way.

Collaborate

Not all your planning prep should be led by you, however. If you're struggling to get motivated, or embarrassed by your own efforts (or lack thereof), why not try 'Naked Planning'?

Don't be put off by the name. Naked Planning is so called because it means making yourself vulnerable, by bringing another person into the incipient planning process.

Whether you struggle to pin your ideas down on paper, or find yourself writing a hundred to-do lists that never get done, having someone else around to keep you accountable can make a huge difference. Choose a non-judgemental but trustworthy, honest individual; not a partner or colleague, but a coach or mentor with enough detachment from the project to help. Share with them what you have mapped out; collaborate with them if you're stuck. Agree goals. Then set yourselves a timetable to keep checking in – whether in person, via phone or skype – on a regular basis.

When you know someone is waiting for you to report back on your progress, it's easy to push yourself through each small task – and there's no chance of you falling behind without realising it.

You're not doing this alone. But when you're working with others, it's essential that you're doing all you can to keep them motivated and engaged.

That means giving up some of your precious time to monitoring, and listening.

Ask staff if there are draining manual tasks they hate, which reduce their efficiency and enthusiasm over the course of an event: are there ways to better share these, or streamline those processes?

Identify if certain tasks are always being overlooked, or left to become overdue: can these be outsourced?

We've already discussed how stressful event planning is, but you won't be the only member of staff feeling the pressure. Offering stress management workshops or Mental Health First Aid training both acknowledges your own stress, and fosters an environment where it can be openly discussed.

Measure the ROI over time

Many events require a fairly retro approach to success. Despite the rise of virtual tickets and livestreaming, the majority of business events revolve around the old-school benefits: building relationships, face to face; developing a positive brand impression. That makes them different to other lead generation channels – and in turn, it makes for harder to measure ROI.

When you're goal setting, choose your KPIs. Pick at least 3: sales leads, attendee demographics, booth traffic, session check-in numbers, event email engagement, event app usage – whatever feels most apt to your event, or most pertinent from past experience.

Then gather your data. Engage attendees to be participants in this process: through live surveys, incentivised gamification (collect business cards or social adds, hashtags or incentivised social shares) – then, with an eye on data permissions of course, use these to follow up. Running the same event next year? Upsell or encourage renewal.

The key to understanding ROI for business events and conferencing is that you have to measure over a long period – years, not weeks.

That may be a hard sell when you're presenting your pre-event costings or showing your final spend. But this is a long tail world. Use your KPIs to reassure the unconvinced. But don't allow yourself to become distracted or disheartened if the ROI numbers look unpromising: you know better.

Try alternative solutions

You may be locked into an event management software solution that simply isn't cutting it.

Take some time to research alternatives. Even if you're not able to shift to a new solution, it may help identify where you can make changes to your own processes to fill the gap, or find add-ons or apps that will support what's missing.

Budget planning, for example, should be an integral and highly-functional part of the package. If that's not the case, try a lightweight cloud-based alternative like Mint or Maxiplan.

Look after yourself

There's no getting away from it: long hours are a fact of life for event professionals.

But that doesn't mean allowing your work to outpace every other priority. Making yourself available 24 hours a day might seem like the best way to serve your attendees or your clients – but an exhausted event planner isn't an effective one.

Keep business hours, and be upfront about that.

If it helps you to separate your two worlds, have a separate mobile phone for work, and keep your emails disconnected from your personal phone. If social media is an integral part of managing your professional presence, use a scheduling tool like Hootsuite or Later to line up content on your off-hours.

There will always be times around event delivery when you need to be more present. But pay yourself those hours back. You've earned them, and you'll be much more useful when you're rested, and able to recharge with friends and family.

Taking care of yourself doesn't need to only happen outside working hours, of course.

If most of your working day is spent at a desk, build opportunities for gentle exercise into your everyday routine. Take the stairs. Walk to your meetings when you can. Pick a lunch spot that gives you a midday stroll. Getting away from your desk helps prevent back problems from poor posture, and sight issues and headaches from too much screen time. Just a change of scene and a little fresh air can be reviving, and support your wellbeing in small but significant ways.

If you're feeling overwhelmed, anxious, or panicky, use a simple breathing exercise to regain some composure and restore yourself. One effective technique involves counting your breaths in fives: inhale for five, hold for five, exhale for five, hold for five. If you're very distressed you may need to work up to this in stages.

Taking care of yourself also means being forgiving towards yourself.

Accept the reality right now: your event will go wrong.

Whether it's a disconnected cable that makes the dramatic lightshow opening go with a fizzle, or an Icelandic volcano that picks an unfortunate time to knock out the nation's airspace, something will go wrong. Possibly more than one thing.

All events will fail in some way. Not every eventuality can be anticipated. What you can take control of is how you handle it. So embrace the inevitable, and deal with what life throws at you as a matter of course.

Don't blame yourself, even if it's your oversight that's landed you in a mess. Instead, concentrate on managing the situation with calm professionalism and clear direction. Then, you can be proud of how well you coped in a crisis – and if you've been really on the ball, your attendees might have no idea.

Do your best

Sometimes, with the best will in the world, you can't make it all add up.

When you have a client whose ambition outpaces all financial logic, you can't conjure up the event of their dreams.

When you have a customer who doesn't want to innovate or add to their budget from last year, there's a limit to what you can achieve.

In all cases, your goal remains the same: deliver well.

Perhaps next year, your returning client will see that you didn't need every bell and whistle to achieve happy attendees. Perhaps next year, you'll be trusted when you suggest expanding the budget to reach a new audience, or keep pace with competitors.

In the meantime, you'll have the satisfaction that comes from giving it your best effort.

Resources

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