



Association Event Planning: The Complete Guide

Event planning is tough,

especially if you're a small-staff association professional with limited time and resources.



There's SO much to keep track of: budgets, registrations, volunteers — the list goes on and on.

So how can you keep up with ALL that without losing your sanity? Is it possible? Where do you even begin?!

We understand the process can be overwhelming, so to help you out, we've put together this complete guide to association event planning. In it, we'll go over best practices for before, during, and after an event.

Ready? Let's get started!

Before the event

So you're planning a big event, huh? How exciting!
To get started, consider the following steps:

1

Assemble a team

If you want to plan a successful event, you need a strong team to help you out. Who should be on that team, you ask? Well for starters, consider putting together a committee of people (staff members and/or volunteers — your choice) dedicated to planning your event. These will be the people you turn to when something needs to get done. Depending on the size of your event, you may even want to establish subcommittees to further divide roles and responsibilities.

In addition to having a committee in place, you'll also want to have a team of volunteers ready and eager to contribute on the day of your organization's event. To find extra hands, consider engaging your membership or reaching out to other organizations for assistance.



2

Determine a budget

Event budgeting is one of the most crucial aspects of event planning. Having a structured budget allows you to see what you can afford, what you can't afford, and where you can cut costs or splurge.

When determining a budget, consider the following factors:

- **Venue**
This includes meeting space, hotel room blocks, parking, staff, etc.
- **Food and drinks**
Are you going to be serving food at your event? If so, you'll want to consider snacks, meals, catering assistance, etc.
- **Speakers and entertainment**
This goes beyond just a presenter. Think equipment rentals, microphones, A/V hookups, and so on.
- **Publicity and promotions**
Remember, not all promo tactics are free. If you're considering items such as printed flyers and/or signs, be sure to factor those in.

3

Select a venue and date

There's a LOT that goes into selecting a venue, but it all starts with requests for proposals, or RFPs. You'll want to fill out a few RFPs, outlining what dates you need, how many rooms you need, whether or not you need food, conference rooms, etc., and submit those to prospective venues.

Based on the responses you receive, you'll likely be able to narrow down your options. For example, some of those venues may not have those dates available or may not be able to offer that many room blocks. If that's the case, that's ok. It just makes your decision easier! (Note: Depending on the size of your event, you may need multiple hotels.)

Once you've narrowed it down to two or three options (or more, if you need them), you'll then want to do a few on-site inspections. After all, you want to see first-hand what the facilities look like and meet who you could potentially be working with. These on-site inspections will likely help you come to a decision.

Before the event

But wait! Before you sign or agree to anything, remember the art of negotiating. Venues are expensive, so you want to make sure you're getting the best deal you can. Below are just a few of the items you'll want to negotiate:

Hotel rooms

This includes room rates, room blocks and attrition rates. (Try to negotiate an attrition agreement, and when it comes time to open up registrations, consider offering an early-bird discount to get those rooms filled fast.)

Food and beverages

Ah yes, food and beverages. Another important factor to consider. Decide what food items and drinks you'd like, and try to negotiate costs, if possible.

Meeting space

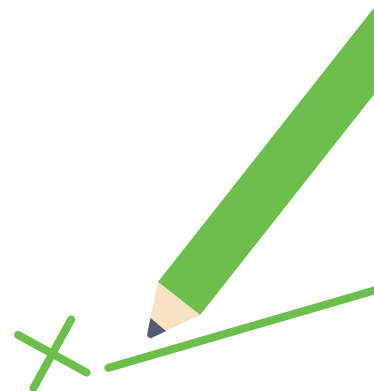
Do you need conference rooms and/or meeting spaces? If so, how do you want those rooms set up? Classroom style? U-shaped? Round tables? You'll want to negotiate all of this in advance. And don't forget about A/V equipment!

Parking

Will there be onsite parking at the event? If so, consider negotiating special rates for self-service and valet, if applicable.

Contract time! Once you've negotiated, read through the contract and make sure EVERYTHING is correct! That includes room rates, hotel room blocks, attrition rates, conference room set-ups, food and beverages, etc. And please, please, please triple check for errors! Even something as small as the date could be wrong.

If everything looks good, feel free to sign, stamp, and GO!



4

Identify a speaker

If you're hosting an event that involves speakers, now is the time to get those sorted out. Announce that you are now accepting calls for proposals, and read through those carefully when they come in. Once they're all in, sit down with your team (i.e. your committee) and decide who would be the best fit for your conference and what content is going to be the most beneficial to your members. Once you've made a decision, reach out to that speaker (or speakers) and confirm.

You'll want to have a contract in place for this as well. It should include the name of your event, the date, the time, what you need from your speaker (a headshot, a short biography, etc.), and what they need from you (a headset, a microphone, and so on).

Note: If you have a website that enables speakers to log in to a password-protected area, you can easily provide these materials and more. Also, you may want to consider using online forms to capture this kind of information so that this process is as easy and efficient as possible.

5

Acquire sponsors

Events are expensive — that's no secret. To help with the costs, consider reaching out to other companies within your industry and asking if they'd be interested in sponsoring your event. Associations, like your own, provide industries with value (and more importantly, exposure), so many companies are willing to pitch in.

To generate interest in an event partnership, why not...

- **Put together an event sponsorship package**
- **Provide a list of sponsor benefits**
- **Post information on your association's website**
- **Ask your members to assist with recruiting**

Remember, the more sponsors you can get, the more you'll be able to do (budget-wise) at your organization's event.

6 Determine a registration process

You put a lot of time and effort into planning your event, so you want people to attend, right? Of course you do! One of the best ways to boost registration rates is to offer a seamless and all-encompassing registration process. No one wants to mail in their event registration — they want to do it online. That said, make sure you have an online registration system in place. And since more people are engaging with the web through their mobile devices, it's equally important that your registration system be mobile-friendly. Remember, the easier it is for people to sign up for your event, the more likely they are to do so.

To make your registration process easy, consider the following components:

- **Registration forms**
Do you have registration forms set up and ready to go? Do you have links to them on your organization's website?
- **Cutoff dates and pricing models**
Does your pricing change based on cutoff dates? Do you have a system in place to manage those adjustments automatically?
- **Multi-registrant forms**
Will users need to register more than one person? If so, do you have a process in place to support multi-registrant forms?
- **Breakout session sign-ups**
Are you holding breakout sessions? If so, can users register for those when they sign up and pay?
- **Notification emails**
Do you have a process in place to remind registrants (via email) of the event as it gets closer? If so, will that process be completed manually or electronically?

If your current system lacks any of these components, it might be time to consider an association management system, or an AMS. An AMS is a technology solution that assists with all of the tactics listed above — and more. When it comes to association event planning (and membership management, in general), an AMS can truly be a lifesaver.

7 Promote heavily

Regardless of how great your speaker or entertainment line-up is, you still need publicity to get people in the door. To promote your organization's event, consider the following tactics:



Email

Email marketing is crucial when it comes to event planning and promotion. It's easy, and better yet, cheap! Since you already have a running email list of all your members, donors, and prospects, send them an email inviting them to your event. Then, take a look at your past attendance reports and re-invite all of those people — even if they're not members. This is a great way to re-engage those folks.

Now it's important to note that email marketing shouldn't end once your invitations go out. Leading up to the event, you'll want to send out a few email reminders as well. This process may sound cumbersome, but if you're utilizing an AMS, it's actually extremely easy. An AMS automates everything, so all you have to do is set up your email reminders, determine which days you want them to go out on, and voilà — you're all set!

Your website

Regardless of what type of event you're hosting, there should definitely be a place for it on your organization's website. Start by creating a web page specifically for your event. Be sure to include a compelling description, relevant pictures (if you have any), and a prominent "register now" button. (If your event is on the larger side, you may even want to create a separate website.)

Once your event page (or website) is live, be sure to list it on your website's event calendar. Then link that listing back to your event site or registration page.

And this probably goes without saying, but make sure the event is displayed prominently on your organization's home page. You want all of your website visitors to see it!

Social media

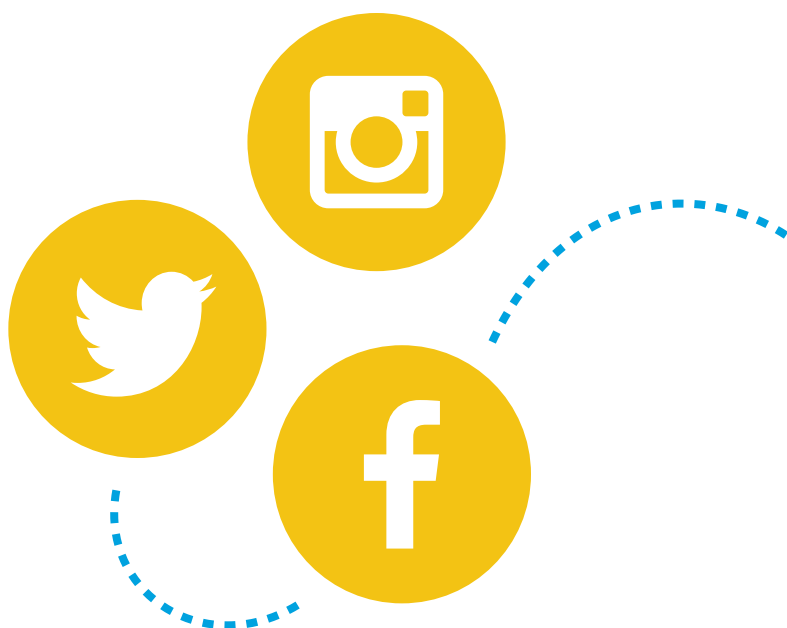
Social media is a promotional MUST. After all, it's free — and you really can't beat that! If your organization has a Twitter account, be sure to tweet about your event on a regular basis using a designated event hashtag. Encourage your sponsors and exhibitors to tweet about your event as well, using that same designated hashtag.

Leading up to your event, you'll want to publish several promotional posts on Facebook as well. If you really want to drive awareness, you can even organize a Facebook contest in which you offer a free ticket or discount on your event price.

And don't forget about your organization's blog! Consider putting together a few pre-event blog posts to further generate excitement. You can even ask one of your speakers to write a guest post if they have time.

Offline marketing

Did you budget for any offline marketing tactics? If so, feel free to get creative! For example, if you're hosting a conference in Texas, why not send out a fun bandana mailer? Or if your event has a luau theme, why not send out a few Hawaiian leis? Remember, these are just a few extra ways to get people excited.



During the event

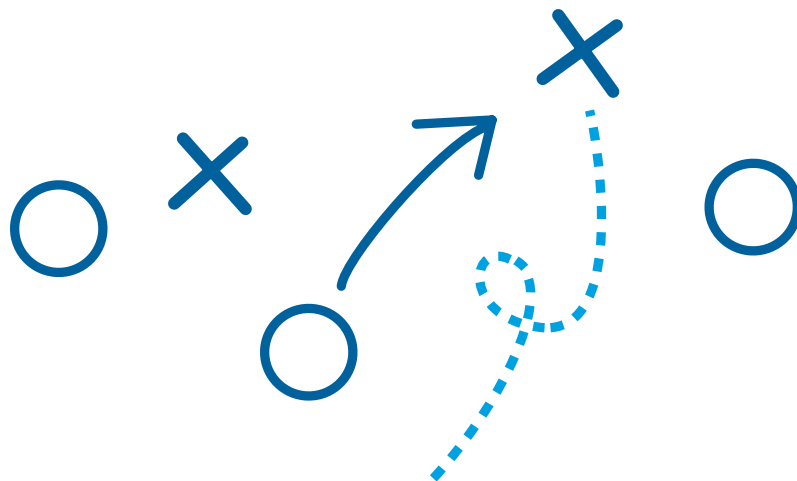
It's showtime! On the day of your organization's event...

1

Make sure your team members and volunteers know where to go

The 'day of' is always stressful, so to minimize chaos, make sure all of your team members and volunteers know exactly where to go. Everyone should have a "job" (or several jobs) and a particular "spot" to be in. For example, you'll want to have several people up front managing the check-in process and passing out attendee name badges.

And speaking of the check-in process, if you have an AMS, we highly recommend using it to check attendees in. Here's why: If you check people in via an AMS, you can then go back and see who actually attended and who, sadly, did not. Plus, with just the click of a button, you can then follow up with those groups (attendees versus non-attendees, and even members versus non-members) accordingly.



2

Utilize social media

We talked about using social media to promote your organization's event, but it's also a great tool to use during your organization's event. It can help you engage with attendees, keep track of what people are saying, and even create a sense of FOMO, or fear of missing out, for people who aren't there. The benefit of this? It might encourage them to register next year!

Now Twitter is really the best tool to use during live events. Ever heard of live-tweeting? It's a GREAT way to boost engagement and build your online following.

If you're thinking of live-tweeting your organization's event, we highly recommend it! But before you do, here are a few tips:

- **Alert your followers**
If you're going to be live-tweeting an event, it's good Twitter etiquette to alert your followers ahead of time. This will allow interested followers to engage and participate.
- **Use the event hashtag**
Your event hashtag is vital to your live-tweeting efforts, so be sure to include it in every single tweet. When faced with the choice of cutting the hashtag or shortening the tweet, always, always, always shorten the tweet.
- **Include rich media**
People respond better to tweets with rich media (photos, videos, GIFs, etc.). In fact, tweets with images are 94 percent more likely to be retweeted than plain text tweets. That being said, try tweeting a few images and/or videos to spice things up.
- **Respond to questions and comments**
If people are actively engaged with your live-tweeting (i.e. asking questions or making comments), try responding to them as much as possible. Sure, you won't be able to respond to everybody, but the simple act of "liking" their post will be enough to keep your audience engaged.

3

Mingle with your members

We know hosting an event can be overwhelming, but this is a great opportunity to engage with your organization's membership. Don't let it pass you by! Walk around. Shake hands. Engage in conversation. You worked hard to plan this event, so do your best to make the most of it.

4

Stay Calm

If something goes wrong at your event, don't panic. This happens to everyone. You just have to go with the flow.

That said, to minimize problems and panic-levels, make sure you have the contact information of everyone helping out. This includes staff members, volunteers, caterers, hotel managers, etc. That way, if something does go wrong, you know exactly who to reach and how.



After the event

Whew, you survived! We knew you would! But before you sit down and relax, there are a few more things you need to take care of...

1

Evaluate internally

After all that hard work, you want to know how your event went, right? Of course you do! Start off by evaluating it internally. Are you satisfied with how everything went? How was attendance? How many people signed up and how many people actually showed up? If you're utilizing an AMS, you can pull attendance reports with just the click of a button.

In addition to attendance, you'll also want to evaluate costs. Did you stay within your budget? Were there any unexpected costs that came up? If so, make note of what those were for the next time.

2

Collect feedback

Now you can't do ALL of the evaluating on your own. You need to get your attendees' feedback as well. After all, they're the ones you're trying to please.

To get feedback from your attendees, consider the following tactics:

- **Placing comment cards on tables at your event**
- **Posting a survey on your organization's website**
- **Emailing post-event surveys directly to your attendees (Like email reminders, these are extremely easy to send with the help of an AMS.)**

3 Thank your sponsors and volunteers

This one's a biggie. Without the help of your sponsors and volunteers, your event wouldn't have been possible. To show your appreciation, try sending out hand-written thank you notes. If you can't put together enough notes in a reasonable amount of time, give your sponsors and volunteers a call. Just remember, the more personal the "thank you," the better.

4 Post photos on social media/in your online social communities

The benefits of posting photos online are two-fold: 1) It's a great way to engage with your members and attendees, and 2) It reminds people how much fun they had. Not to mention, if non-attendees stumble across those photos and see how much fun other people are having, they might be more inclined to attend your next event. (Score!)

5 Follow up with non-member attendees

If you had any non-members attend your event, this is the perfect opportunity to follow up with them. How do you know if you had any non-members attend your event? Well, if you used an AMS to check people in, you can easily pull up your registration list and filter it by non-member attendees. Pretty cool, right? Then from there, you can email those people and encourage them to join your organization.



Ok, that was a LOT of information to take in — we know.

But by following these best practices — before, during, and after an event — you can easily boost engagement and possibly even recruitment rates.

Like we said, planning an event is no easy task. But fortunately, an AMS can help with all of these tactics — and more!

Want to see what else an AMS can do?

Check out our free guide, **What is an AMS** here!



◀ Click here to check it out!

More about MemberClicks

MemberClicks offers all the tools that membership organizations need to make the most of the web. From online databases and event registrations to custom-designed websites and member communities, our products are tailor-made for small-staff organizations.

For more information:

- ▶ Visit us at www.memberclicks.com
- ▶ or call us at **800.914.2441**

