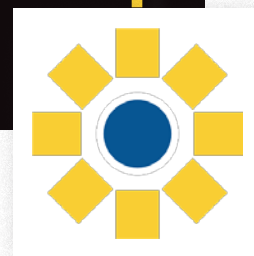
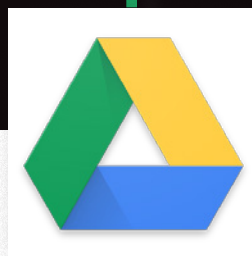
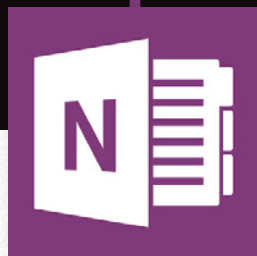
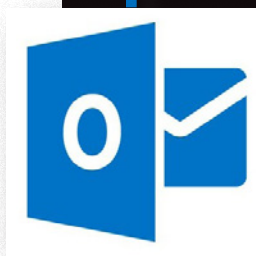


# INTEGRATING ONLINE TOOLS INTO EVENT MANAGEMENT

By Jill McCullough



How do you organize your time and the people you interact with every day? Do you bury your life in post-it notes, write long lists of 'to-do's' or have a white board in your office that is always getting erased by others? Whatever the case, as an event planner, you need organization and there are numerous ways to use technology to help simplify what we do.

The first question you must ask is why do we need to be organized? As event planners, organization can be the key to our success and the ticket to a more stress free life!

Yes, some people were blessed with the ability to keep even the smallest of items organized. We all know those people born with a label maker in one hand a checklist in the other. For most of us, this is not the case, but with the ease and availability of technology at our fingertips, we have no excuse! Here we will outline some great tips you can implement into your planning process to help you become a more organized professional!

As event planners there are five main items we need to keep organized:

1. Contacts
2. Schedules
3. Notes
4. Data
5. Goals

Technology has provided us with programs, applications and opportunities to become organized in these five areas. The programs we will highlight in this article include:

1. Contacts \**Microsoft Outlook*
2. Schedules \**Microsoft Outlook*
3. Notes \**Microsoft One Note*
4. Data \**Google Drive*
5. Goals \**LeanKit*

**Contacts:** Contacts are the people you meet each and every day. It is important to store valuable information about your contacts, not simply a name and phone number. In the event planning world, valued contacts make all the difference! I use *Microsoft Outlook* to manage my contacts. I choose to use this program because when using the contact form you not only have a place to store the necessities about the person (phone number, email, fax etc...), but you also have the opportunity to note valuable information about the person as well. These notes may take the form of personal attributes about the person to help you remember them such as "redhead with a big smile." You can also use this feature to record notes about of relationship you have with the person such as "my boss's sister that works for Kensington." Keeping good notes about your

contacts allows you to rejuvenate relationships with people you may see only once or twice a year. You can access this from your *Microsoft Outlook* account under the contacts section. Best of all, adding notes to the contacts form allows you to add searchable information to their profile. So the next time you are looking for "the redhead with a big smile," you can search for it and find it much quicker!

**Schedules:** A wise person once said, what you value in life should be scheduled on your calendar. Not that all of life needs to be "penciled in," but those things that are important to you should be written down. I understand the element of surprise and spontaneous experiences are necessary for life, but those things that you plan for should be just that, planned for and scheduled onto your calendar. The first step in organizing your schedule is to choose a method of organization that works for your life. Secondly, you need to stick to this method ALWAYS. Organizing your time helps you to complete the things you wish to do each day. Organization with your schedule allows you to be prepared as a professional while being fully dedicated to your personal life. Scheduling in those things that matter most to you brings peace and purpose in life.

## As event planners, organization can be the key to our success and the ticket to a more stress free life!

**Notes:** As a graduate student, I was introduced to a program called *Microsoft One Note*, and I have been in love ever since! If you have not had the opportunity to open this program on your computer, you should take the time to do so. *One Note* is the ultimate notebook! No more thumbing through filing cabinets or searching your computer for the copy of the flyer you needed, the audio recording taking from the council meeting or even the photo of the event set-up from last year. Now you can organize all of this with *One Note*! *One Note* allows you to input all forms of information including photos, text, pdf's, audio recording and videos! Best of all, all the items featured in your notebook are searchable, including the words you speak in an audio recording, video recording or even on a photo. If there is text, it is searchable! All your notes from events can be placed into your notebook and can be organized as deeply as you wish. From the smallest post-it note to a twenty page contract, all of these items can be stored and searched in one location, in your *Microsoft One Note Notebook*.

One note is a very easy program to learn to use as well. There is a great 10 minute YouTube video that does complete tutorial of this program. You will also find yourself becoming more and more eco-friendly because of the reduction of paper you will be printing and storing.

**Data:** As an event coordinator it is crucial to keep your data organized for a variety of reasons. This data can vary from people admitted to your event, to those registered as volunteers. With so much data coming in and needing to be digested and sent back out, *Google Drive* provides a way to do this...and it's free!

*Google Drive* is an internet based program that can be accessed via google. To set up an account, all you need to do is register with *Gmail*. There are many applications you can use that are comparable to the *Microsoft Office* programs, but the newest and most useable for event planners in the "Forms" section. In this section, you can create all types of forms and request specific answer methods. For example, you can ask a simple question that requires a 'yes/no' answer or you can ask other questions that require an answer of a paragraph or more. Once you have created a form, google creates three versions of your form. The first is the one you created, the second is the "live" version of your form, or the version those filling out the form will see, and the third version is the "responses" version of your form. The "live" version of

your form is found on the internet and is, therefore, a link that can be placed in emails or on a website very easily.

For an event that I organized in 2014, I used all my registration forms as google docs. From those applying to be a vendor to those registering to be a volunteer, I collected all their information on the google forms. This was very simple and easy to manage. The "response" form for the document updates automatically, so you can keep track of the data in real time. As the editor of the form, you can also edit the form at any time during the gathering of data. For example, I used this form to gather the information for a golf tournament we were hosting, and I had a team call in and tell us two of their players on the team had changed. I simply opened the "responses" form of the document and made the changes while on the phone with them. When it came time that the registration was closed, I simply closed the document and exported the data into an excel sheet. In addition, all google documents can be shared, viewed or edited by anyone you wish to add to the form. For example, you may be working on a project with another individual and you both need to be privy to the same data. Google Drive allows you to both view the data in real time and have the capability to edit the information if necessary.

Some of the purposes I have used google drive for as an event planner includes:

- Collecting registrations for 3on3 tournaments, mud volleyball tournaments, golf tournaments
- Collecting entertainer applications for music festival
- Vendor applications
- RSVP's for Company Dinner
- 5K Race registrations
- Parade applications
- Talent Show registrations

...And the list continues to grow! This program too is very user friendly, but there are also MANY tutorials available for free on YouTube.

**Goals:** Les Brown once said, "A goal is never accomplishable until it is written down." Therefore, we must have a good way to write down and track our goals as we move through the different stages of them. In my search for a better way to track my goals I found a free program management application online. As event planners, there are times and places to get the things done we need to do. Whether we are running a team of professionals or working on producing an event on our own, it is

important to know what your goals are and how you plan to accomplish them. The program I have found that will do just that is called "LeanKit". Lean kit is a large whiteboard that can be edited, saved and shared in a variety of ways. Best of all, when you are finished with completing all the tasks on your board, you don't wipe it all away; you save that board and start a new one. This feature makes tracking your goals easier as time moves on, especially for those who do annual events. As the planner for a previous event comes up again, all you do is open up the goal board from the previous year and start it again. Lean kit allows you to create columns that can be sliced by rows. Then in each of these columns you create and place cards in those columns. The cards can also be color coordinated to help you know what items you are working on when. For example, the columns I used were titled: "To Do," "Doing tomorrow," "Doing today" & "Completed". I began by creating cards for each and every task I know I needed to accomplish to plan form, implement and complete the upcoming event I was planning. I spent time at the beginning outlining the exact items I needed to accomplish effectively to complete the job. As these items were moved from one column to another, I thoroughly enjoyed the feeling of success that came along with it as well! Each time a card was moved from one column to the next, I felt motivated to continue moving forward.

Using this application to help me track my day to day goals allowed me strategically to complete the big goal of producing an event for thousands of people!

In addition to using Lean kit to help accomplish my professional goals, I also use it to track my personal goals. This program is free to sign-up for online and on the website you can watch a short tutorial and sign up for a free webinar that delves into the finer details of what the application can offer.

Overall I have found that embracing the opportunities technology has offered me is not only providing me with a more effective way of using my time as a professional, but it has also helped me to grow as an individual.

**Jill McCullough** and is from the great state of Utah! She started her professional career as an elementary school teacher and has been working in special events for the past two years. She is currently in graduate school working towards her MBA and hopes to establish her own business in the next five-ten years. One of her biggest dreams in life is to become a pilot and fly herself and her family all over the world to visit all her IFEA friends!