

By Suzi Patterson



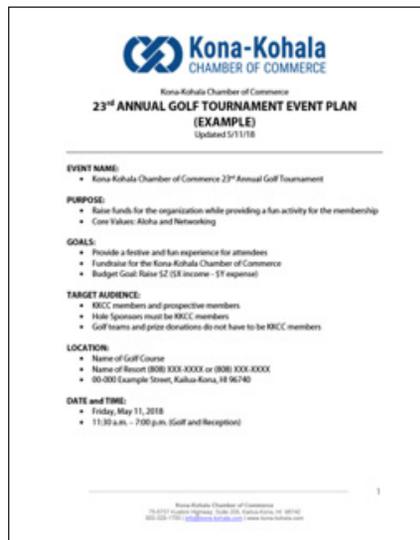
Tools for Efficient Time Management While Planning Events

All too often when planning an event, deadlines that initially seemed inconceivably far away sneak up quickly to catch event organizers off guard. The field of project management offers ideas and templates that are relevant to event planning. By using a handful of tools, event managers can ensure that they have a tried-and-true structure for their event timeline.

The University of Minnesota College of Science & Engineering defines project management as “managing people, time, money and resources to achieve a successful project.” Since an event definitely classifies as a project itself, it is easy to see why project management strategies would prove to be helpful while planning an event.

The following four tools will help event organizers to manage their time while planning and executing events. Each tool serves a different purpose for planning, project visualization, reporting and tracking. One tool might serve a certain type of event better than another, or it may be helpful to employ a combination of all of the tools at once.

Golf Tournament		
Work Group	Tasks	Person Responsible
1.1 Begin Planning		
	1.1.1 Create Event Plan	Person 2
	1.1.2 Make Budget	Person 1
	1.1.3 Prepare Marketing and Comms	Person 2
1.2 Golf Rules		
	1.2.1 Set Up Golf Committee Meeting	Person 2
	1.2.2 Establish Tournament Rules	Golf Committee
	1.2.3 Confirm Tournament Rules	Person 2
	1.2.4 Design Rule Sheet	Person 2
	1.2.5 Send Rule Sheet to Pro Shop	Person 2
1.3 Venue and Equipment		
	1.3.1 Confirm Venue	Person 1
	1.3.2 Set Up Call with Catering Manager	Person 2
	1.3.3 Establish and Confirm Event Flow	Person 1 and 2
	1.3.4 Create Checklist of Items to Bring	Person 1 and 2
	1.3.5 Prepare Items to Bring	Person 3
1.4 Outreach		
	1.4.1 Open Registration	Person 2
	1.4.2 Write/Send Letter to All Members	Person 2
	1.4.3 Receive RSVPs	Person 2
	1.4.4 Create Registration List	Person 3
1.5 Volunteers		
	1.5.1 Advertise Need for Volunteers	Person 2
	1.5.2 Track Volunteer Sign-Ups	Person 3
	1.5.3 Communicate With Volunteers	Person 3
	1.5.4 Check In Volunteers at Event	Person 3



Tool #1: Event Plan

Although typically called a Project Plan in the world of project management, this general and encompassing document is already utilized by many event planners and is known familiarly as an Event Plan. The beauty of an Event Plan is that teams may start using a basic structured document (created in any word processing program, such as Pages or Microsoft Word) and continue to customize the layout and flow over time.

The first page consists of a cover page with the company’s logo, the title

of the event and basic line items with an information snapshot (date, time, location, event mission, budget and revenue goal, etc.). It is very important to include a line on either the first page or the document footer to indicate the date that the Event Plan was last updated. Whether an event is planned by an individual or a full team, it will save time to make a quick note each time the content is updated so that just a quick glance is all that is needed to see whether everything is current.

After page one, the remainder of the document may be adjusted for length and content to suit the event and planning team. Depending on the complexity of the event, a table of contents page may be helpful to guide recipients of the document during meetings. A timeline should be included with columns for each event planning task, the responsible party (whether an individual, committee, volunteer, etc.), the estimated task completion date and a space for notes.

Additional pages could include: a bulleted list of responsibilities for each team member, a budget page with itemized income and expenses, a page with vendors and their contact information, an event flow timeline, a page for post-event analysis and anything else that would be useful to share during event planning meetings.

Overall, an Event Plan serves as an aid to make event planning meetings more

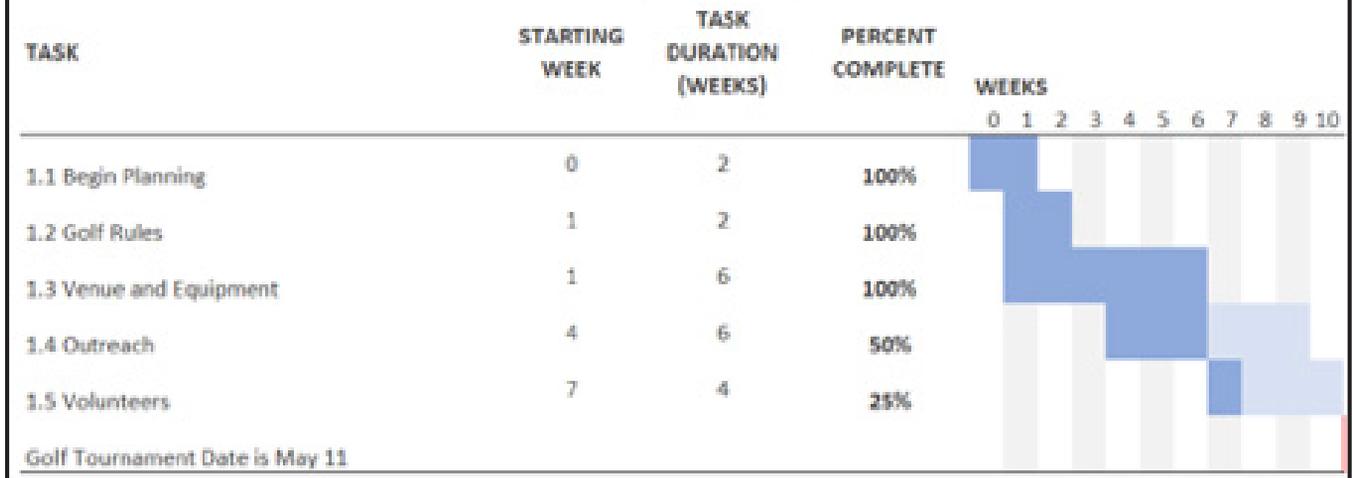
efficient and can provide a suggested agenda to talk through the most important aspects of the event without forgetting anything. Additionally, the document provides an excellent record of the event planning process. For annual events, only minimal adjustments are needed to begin the planning process again the next year. If any members of the event planning team leave and new members are added, the Event Plan will help the on-boarding process flow smoothly.

Tool #2: Work Breakdown Structure (WBS)

The University of Minnesota College of Science & Engineering defines the Work Breakdown Structure (WBS) as “a hierarchical list that defines the major elements of a project, breaking up a complex project into manageable parts.” This approach looks like a flow chart and is useful for a visual and categorical representation of event planning tasks. Like an Event Plan, a flow chart may also be created in Pages or Microsoft Word.

On the top level of the WBS “flow chart” is the event itself. The second level lists categories of tasks numbered (1, 2, 3 and up) within the event planning process such as marketing, operations, volunteers, site logistics, etc. Each subsequent listing under the main categories are numbered accordingly (1.1, 1.2, 1.3 and up) and

Gantt Chart Example



if more details are required beneath the third level, more levels can be added in the same pattern (1.1.1, 1.1.2, 1.1.3 and up).

With a WBS, event reporting is streamlined during larger meetings with stakeholders that are not necessarily involved with the full planning process. With just one document, the event manager can point out the current status of each task category. This tool is also helpful for status meetings for planning big events with many responsible parties. Each group can report on their category and the whole team can visualize the progress within the grand scheme of the full event.

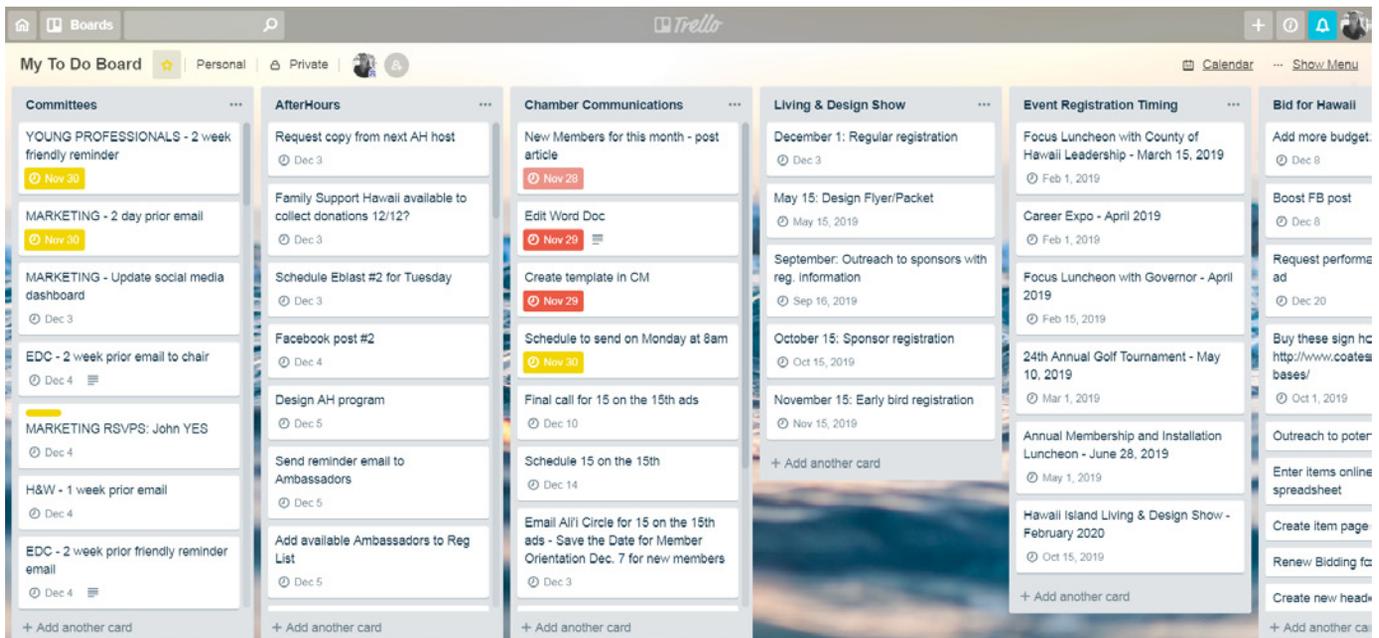
With the structured numbering system, the visual WBS chart can also be translated to a spreadsheet (using a program like Numbers or Microsoft Excel). To spell out more details, additional columns can be added to the spreadsheet to indicate cost, resources needed, etc.

Tool #3: Gantt Chart

Boston University Medical Campus defines the Gantt Chart as a “project management tool to illustrate the start and finish dates of project tasks.” A Gantt Chart can be easily created in a spreadsheet (with a program such as Numbers

or Microsoft Excel) or following an online template. Like the WBS, a Gantt Chart can be formed as a high-level overview of the full event planning progress across multiple major categories, or multiple Gantt Charts can be created with one for each major category to show more detail.

On the spreadsheet, each row represents an individual task and columns represent time in increments of days, weeks or months. Horizontal bars in the chart indicate the expected time for each task. The tasks can be run sequentially, in parallel or overlapping. As the event planning progresses, each bar should



be updated using colored spreadsheet cells to represent how much of the task has been completed. Some templates include a key that automatically updates the horizontal bar based on a “percentage completed” figure entered by the event manager. Milestones can also be added using a text symbol like a red line to represent significant points during the event planning process, such as committee meetings or presenting to a board. Multiple charts can be created within a single event for large-scale events with more than 15-20 major tasks. Generally, each Gantt Chart should only take up one page.

As with the Event Plan, it is important to reserve a line or footer space to indicate the date that the Gantt Chart was most recently updated. Usually it is common practice to update a Gantt Chart at least every two weeks, but this could vary depending on the event complexity.

Task dependency (called the “critical path”) can also be shown on the chart. A critical path is defined by Stanford University as “the sequence of activities which add up to the longest overall duration” or in other words, “the shortest time possible to complete the project.” Using the critical path as an indicator can be helpful for event planners to identify which tasks are most essential to keep the event plan on track. By definition, if any task on a critical path is delayed, the final estimated completion date will be impacted. A project can have multiple critical paths.

To determine whether a task is on a critical path, look for dependencies between tasks. For example, the event venue needs to be selected before a catering company can be finalized, and the entertainment needs to be confirmed with contracts signed before tickets can be created. Basically, if a previous step needs to be finished before the next task can begin, that task is on a critical path.

By calculating the critical path, event planning can be optimized. The event manager can easily identify which tasks should be prioritized to shorten the critical path. Additionally, more tasks could be orchestrated in parallel to keep everything moving quickly. On a Gantt Chart, critical path tasks can be illustrated by highlighting their horizontal bars (or their task numbers, on a WBS) with a certain color.

Similar to a WBS, a Gantt Chart is an excellent time-saver for stakeholder presentations. The visual chart gives a quick snapshot of project progress, but with the added benefit of less verbal explanation required. On a WBS, task leaders need to report their updates to help translate the document, but the Gantt Chart speaks for itself on the timeline with less details about the specifics of the sub-tasks.

Tool #4: Online Project Management Software

The previous three tools are proven standards that are guaranteed to help event planners to manage their time more efficiently by organizing information into easily communicable formats. During team planning meetings and stakeholder reporting, the Event Plan, WBS, Gantt Chart or any combination of the three will cut down on the need to re-hash previously discussed details and setting up a visualization of timelines. As every event planner has experienced, the best of intentions to keep such documents accurately updated in a timely manner can be spoiled by day-to-day small emergencies that seem more important in the moment. To help with managing time for long-term event planning, the daily use of online project management software can quickly become indispensable.

There are multiple project management software companies online with different packages to suit different team sizes and project scales. To name a few, options include Wrike, Asana, Monday.com, Smartsheet, Trello and more. For the purposes of this article, Trello (www.trello.com) will be discussed in detail, but each software company offers similar features within their programs.

Trello is a free, online software program that can be used on both desktop and mobile devices. Paid upgrades are available to add multiple users and more features. For individual event managers, the free version offers enough features to manage time efficiently while planning one or multiple events. Within Trello, the user can set up one board for multiple events. The option also is available to set up multiple boards for different events within one account.

A Trello board consists of multiple lists, which may be re-organized, moved, added or deleted easily. Each list has its own title and houses as many cards as needed. The Trello cards have flexibility to house any type of helpful information: a photo, reminder, sub-task, important date, to-do item, etc. Additionally, each card has the option to be: marked with colored labels (to indicate critical path tasks or to differentiate different types of tasks, for example), assigned to different team members (on shared boards), updated with notes and comments and given a smart due date which will turn yellow as it approaches and then red when overdue. Trello also provides “Power-Up” options to integrate the software into other programs. For example, a Gmail Power-Up allows the user to file email messages as a Trello card to aid with email management.

For day-to-day event planning, a program like Trello is helpful for event managers who oversee multiple events or various sub-tasks within a large event. By integrating the event planning tasks into the same program used to monitor other daily tasks, Trello ensures that the event will always stay top of mind. Organizing cards by due dates gives the event manager an easy glance at which tasks are coming up, and reminders can be set ahead of time to check in with vendors, volunteers and other stakeholders so that nothing falls off the radar.

Keeping these project management tools in the event planning toolbox will provide inspiration for an initial structure for event managers to implement and customize over time.

Suzi Patterson is the Event and Marketing Manager for the Kona-Kohala Chamber of Commerce in Kailua-Kona, HI. The Chamber of Commerce holds many events, including a monthly networking event, annual golf tournament, home expo, holiday online auction fundraiser, luncheons, forums and more. Suzi graduated from the University of California, Berkeley with a Bachelor’s degree in Psychology, and is currently working towards her CFEE. She can be reached by email at suzi@kona-kohala.com.