

SECOND EDITION

EVENT PLANNING

THE ULTIMATE GUIDE TO SUCCESSFUL
MEETINGS, CORPORATE EVENTS,
FUNDRAISING GALAS, CONFERENCES,
CONVENTIONS, INCENTIVES AND
OTHER SPECIAL EVENTS

JUDY ALLEN

WILEY

PRAISE FOR OTHER BOOKS BY JUDY ALLEN

EVENT PLANNING

The Ultimate Guide to Successful Meetings, Corporate Events, Fund-Raising Galas, Conferences, Conventions, Incentives and Other Events

(ISBN: 978-0-470-15574-5)

“Allen is a good teacher. Wise planners will add *Event Planning* to their personal reference library as a useful working guide.”

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“A blueprint for executing events for 50 or 2,000, with budgets of a few thousand dollars to hundreds of thousands.”

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—*Harvard Business School, Working Knowledge*

“Judy Allen strikes again. The veteran event planner . . . writes with the voice of experience and offers readers guidelines for establishing ethical policies in the office and on-site at events . . . a good refresher, and excellent reading for novices who need to know how to keep personal and professional boundaries from being crossed.”

—*Corporate Meetings & Incentives Magazine*

“This book contains invaluable information for anyone who handles events for their organization. A host of real-world stories from the field—the good, the bad, and the ugly—serve as examples of codes of conduct (or lack thereof) as well as cautionary tales of what can happen when ethics and etiquette fall to the wayside. Allen thoroughly examines many scenarios and provides practical advice that any planner would be foolish not to heed.”

—*Charity Village*

MARKETING YOUR EVENT PLANNING BUSINESS

A Creative Approach to Gaining the Competitive Edge

(ISBN: 978-0-470-83387-2)

“For event planners who are tired of being a well-kept secret, *Marketing Your Event Planning Business* offers invaluable advice on targeting talents and targeting clients. It’s a wonderful boost for event planners looking to expand their client base.”

—Lisa Hurley, Editor, Special Events Magazine

“Judy Allen has crafted another meaningful book in her series on event practices. Every business owner must immediately add this treasure chest of useful ideas to their bookshelf.”

—Richard Aaron, CMP, CSEP, President of BiZBash Media, NYC

“Judy Allen has given us the ultimate resource guide to event planning. It’s everything you need to know to launch a successful company.”

—Ramey Warren Black, Partner, Media-Savvy

TIME MANAGEMENT FOR EVENT PLANNERS

***Expert Techniques and Time-Saving Tips for Organizing Your Workload,
Prioritizing Your Day, and Taking Control of Your Schedule***

(ISBN: 978-0-470-83626-2)

“She has done it again! Judy Allen has written an excellent, educational and user-friendly book, which is a priceless resource for planners worldwide. *Time Management* is an essential book for all planners, new or seasoned. Judy has provided the tools for managing your time which is one of the *most* important skills for event planners and all professionals.”

—Ysabelle Allard, Meetings & Incentives Planner, Bilingual Meetings & Incentives

“At last, a time management book written by someone who knows what it is to juggle three programs, six clients, eighteen suppliers and a family in a pear tree! Using Judy Allen’s tips have really made a difference!”

—Brigitte Mondor, CMP, Event Leader, Microsoft—Maritz Canada Inc.

“A very no-nonsense approach to the real problem of time management. Some excellent tips and strategies for the busy professional.”

—Deborah Breiter, Associate Professor, Rosen College of Hospitality, Orlando, Florida

“As all experienced and inexperienced event managers will know, time is one of the main resources that has to be managed effectively for successful events. In this practical skills-based text, Judy Allen explores time management and provides techniques for event professionals to learn and apply to your work. From exploring your current use of time, through prioritising and action planning, to multi tasking, project management and balancing your personal and professional life, Judy provides hints and tips for making better, and the best, use of time, based on her years of experience in the events industry.”

—Glenn A. J. Bowdin, *Principal Lecturer, UK Centre for Events Management, Leeds Metropolitan University*

THE EXECUTIVE’S GUIDE TO CORPORATE EVENTS AND BUSINESS ENTERTAINING

***How to Choose and Use Corporate Functions to Increase Brand Awareness,
Develop New Business, Nurture Customer Loyalty
and Drive Growth***

(ISBN: 978-0-470-83848-8)

“As usual, Judy Allen has written a valuable book filled with important information. She adds depth and breadth to the body of practical knowledge about the nuts and bolts of event strategy and tactics. This volume should at all times be on the desk of every planner and every business executive charged with planning an event.”

—David Sorin, *Esq., CEO, Management Mpowerment Associates, and Author of The Special Events Advisor: A Business and Legal Guide for Event Professionals*

“Intelligent planning and thorough execution are the keys to success for any corporate function. Judy Allen outlines a succinct, practical methodology that will ensure your next event achieves its stated business objectives and creates a positive lasting impression.”

—Zeke Adkins, *Co-founder, Luggage Forward*

“In today’s competitive business climate, a ‘business as usual’ approach to corporate events and functions simply does not work. Judy Allen has compiled in one comprehensive guide everything today’s successful executive needs to know to take this strategic function to the next level.”

—Evans Gebhardt, *Executive Vice President, Eos Airlines, Inc.*

Event Planning

Second Edition

Event Planning

the ultimate guide to successful meetings, corporate
events, fund-raising galas, conferences, incentives and
other special events

Second Edition

Judy Allen



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Dedication

*T*his book is dedicated with much love to a very important person in my life, my 2jproductions business partner, mentor, dearest friend and so much more, Joe Thomas Shane, whose brilliant mind challenges me and whose incredible, continually growing and evolving spirit inspires me daily—personally, physically and professionally—to become my best (mind, body and soul) in order to do more, give more and be more; whose business acumen I hold in the greatest of respect; whose creativity sparks mine to greater heights; whose quick wit makes me smile and who is one of the very few people in the world who can easily make me laugh. Thank you for bringing new energy, purpose, passion and play into my life. I believe that our exciting new ventures, which will take event planning and special events in a very fresh and unique direction and add new dimensions, will have tremendous value in the world and I look forward to taking this step together with you. Meeting you—through the first edition of this book—has been life changing and I will always consider you one of my life’s greatest blessings from God/the Universe.

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Preface

The world of event planning has grown, evolved and changed since the year 2000 when *Event Planning: The Ultimate Guide* was first published. While the foundation of the first edition of this book—which introduces readers to basic event planning principles—is rock solid, I felt that the new growth areas that can be added in the second edition would make this book even more relevant in a rapidly changing world and event planning industry, which now includes professional event planning companies who handle corporate events, social events, nonprofit events and weddings (wedding planning has now grown into a multibillion-dollar industry and falls under the umbrella of professional event planning); incentive houses; meeting planners; independent planners; corporate in-house event planners and in-house nonprofit event planners, as well as corporate executives charged with producing company events that bring about a return on their corporation's investment of time, money and energy.

In terms of growth, many universities and colleges around the world have increased the number of event management courses available to students who are aspiring to become professional event planners or work in related industry fields and to those studying marketing, public relations, business and communications who know the tremendous

value—and competitive edge—of being able to understand how to successfully execute and strategically use corporate events can be to them and the companies they will be working for.

The event planning/special events field has developed into a multibillion-dollar global industry with specialty niches that did not exist seven years ago. In the past, event planners worked for an incentive house, meeting planning company or communications firm, or in-house directly with the corporate client. Today, independent event and meeting planners have set up innovative boutique operations and are having great success working with clients who are looking to collaborate with those who are masters of creativity, have a history of successful event delivery and who may be able to offer more flexibility than larger firms and are no longer concerned with the size of the event planning company they are working with.

Many long-term event planning companies are now finding themselves competing for business with a flood of newcomers, and this is changing how business is being both sought and conducted (e.g., many are now working in partnership with hotels, resorts and venues and offering volume rates if a client will sign up for more than one event). And today, in many established larger firms, the number of employees that they house is often an illusion and clients are well aware of that. Many seemingly larger companies have opted—since 9/11 and then the SARS outbreak, when the event planning business came to an immediate stop in many parts of the world and was a time of major financial recovery for an industry very ill prepared to ride it out—to keep only a core creative permanent staff on hand and then bring in freelancers (who may work for many event planning companies over the course of the year and even handle the same corporate client but through a different division with another firm) when needed to handle planning, operations and on-site orchestration. In such instances, both sides must prepare for the major learning curves they will face, so that all flows smoothly and as per company standards.

In the past seven years, event planning has also evolved in many areas. It is now a proven means for a corporation to increase brand awareness, develop new business, nurture customer loyalty and drive growth, and corporate clients—both for profit and nonprofit (and sometimes a marriage between the two)—are looking for event planners who not only understand event design, strategic planning, logistics, timing and budget management, but are proficient in how events can be used to market and brand their company and set them apart from their competition. Being able to motivate their employees is no longer enough as clients are now aware of how events can be staged to meet multiple company objectives and are looking to align themselves with event planning companies who can help them acquire this skill.

The range of the types of events has grown as well and event planners must be able to not only craft traditional events but also to create, implement and execute a second tier of more advanced business functions. In the past, event planners were concerned with mastering primary business functions such as:

- » Board meetings
- » Business meetings
- » Client appreciation events
- » Conferences
- » Conventions
- » Corporate shows
- » Employee appreciation events
- » Trade shows

But now, they must be prepared to take their clients to the next level and elevate their event knowledge to include:

- » Custom training seminars
- » Naming rights
- involving emotional and
- physical challenges
- » Product launches
- » Product placement
- » Executive retreats
- » Special events
- » Gala fund-raising events
- » Teleconferencing
- » Incentive travel and premium
- » Webcasts
- programs

In addition, with some companies, event planners are now having to deal with not only a company's sales and marketing team

but their procurement department, and that presents its own set of unique challenges that planners need to be aware of. Event planners can be of great value if they know what they can do to help their client's sales and marketing executive team to circumvent having to go that route.

Another growing area of concern in the industry is the escalating hard costs of preparing a client proposal with no guarantee of contracting the business. Many event planning companies have found themselves spending up to \$15,000 on a proposal only to find that the company sent out the request for proposal (RFP) merely to fulfill company requirements of submitting three bids, while their intention was always to stay with their incumbent. Those kind of dollars are huge financial hits that no event planning company can afford to keep taking and stay in business. Ways for event planning companies to protect themselves will be outlined in this second edition. Just as the corporate client is looking for a return on their investment of time, energy and money, so must the event planning company, and there is a shift that must be made from positioning yourself or your event planning company as a service industry to marketing and selling your professional services, knowledge on how to design an event that produces results and meets company objectives, and event planning expertise.

Event security and airport security have all changed since 9/11 and that is affecting how participants travel, where they travel to and security requirements on-site at hotels, resorts and venues. This area now falls under event planning design, logistics and on-site requirements. Other major industry changes since 2000 also include technology, sophisticated multimedia presentations complete with storyboards, insurance and contract terms, conditions and concessions in terms of protecting a client's deposit and/or moving their event, for example in cases of disasters, such as New Orleans where a city's entire infrastructure disappeared, or in countries where recent murders of tourists have corporate clients and their guests wary of traveling to the area. Other

areas of change include how corporate events are being played out in the headlines, with company executives—and those they did business with—being held personally responsible for breaches of company ethics, poor business etiquette and inappropriate event spending (e.g., Conrad Black charging back to his company some of the costs for his wife's birthday party in the South Pacific and for private jets).

My intent with the first edition was to design a book that would be used as a working tool, one that would contribute to successful event planning—whether the event is a premiere, tribute, meeting, corporate event, fund-raising gala, conference, convention, incentive, wedding or any other special event, and that has not changed with the second edition. Two of the tips in this book alone would have saved one gala fund-raiser several thousands of dollars in unexpected costs. In one instance, a nonprofit company had not properly researched the difference between holding its event at a convention center instead of a hotel, and had not determined what items would be provided free of charge and what would be provided at an additional cost. This led to an unexpected expense when guests took home centerpieces that belonged to the convention center, and the nonprofit company had to pay to replace them. A small note placed by the display thanking the convention center for the loan of the centerpieces would have avoided the charges the nonprofit company faced. This could have happened at any event held at a hotel, convention center, private venue or even your own home. Another tip in this book would have saved one event planning company the professional embarrassment and loss of a client and their reputation when they had to go back to them to let them know that they had made a \$100,000-plus costing error in the calculation of union costs for a major move in, setup, rehearsal, day of, teardown and move out for their client, and that was only the tip of the iceberg of costs that were not properly researched.

Event Planning: The Ultimate Guide became so successful that it grew into a suite of books, each of which deals in details of a specific

aspect of event planning. This best-selling series of books has been embraced as a valuable teaching tool and is being used around the world by event planning and related hospitality industry professionals, public relations and communication companies, nonprofit organizations, corporate business executives and universities and colleges for course adoption and required reading, and has been translated into five languages. Knowledge is the key to success and it is what will set you apart from your competition both personally and professionally.

What you do not know or do not know to ask can have a major impact on the success of your event and on your budget. In *Event Planning: The Ultimate Guide* I take you behind the scenes—from conception to on-site operations—to show you how to make your event as memorable as it can be, with as few surprises as possible at the end of the day. The magic begins in the detail, which through this book I will attempt to bring to you. Whatever your event may be, there is something in this book that will contribute to making it special. Creating memorable events without unexpected surprises and expenses is what I am most passionate about. This is what I want to bring to you.

To further help you with your event planning needs, visit our companion website. There you can access the sample forms in the appendices, as well as additional samples not included in the book. The website address is www.wiley.ca/go/event_planning.

For quick event planning logistical support reference, below is a brief overview of each of the companion books in the Event Planning series and in my Wedding Planning series, which, while written for the mass consumer, contains valuable event planning information for those event planners who are working in that market as well as for those handling corporate and social events.

The Business of Event Planning: Behind-the-Scenes Secrets of Successful Special Events (Wiley, 2002) takes event planning to the next level. Its comprehensive coverage includes strategic event design; how to prepare winning proposals and how to understand them if you're the

client; how to determine management fees and negotiate contracts; guest safety and security issues that need to be taken into consideration; how to design events in multicultural settings; new technology that makes event operations more efficient; practical tools such as sample letters of agreement, sample layouts for client proposals, forms, tips and checklists; and a detailed case study that runs throughout the book—one company that is organizing two very different events. *The Business of Event Planning* will show you what behind-the-scenes tasks you need to take care of in your own event planning business before you even plan an event and how to take your event design and execution skills to the next level.

Event Planning Ethics and Etiquette: A Principled Approach to the Business of Special Event Management (Wiley, 2003) covers the business side of event planning ethics, etiquette, entertaining, acceptable codes of conduct and industry standards. The book provides event planners with the information they need to stay out of trouble, keep professional relationships healthy and profitable, avoid the riskier temptations of the lifestyle, and win business in a highly competitive market using ethical business practices. Harvard Business School said this book “is a must-read not only for event professionals, but also for small-business people conceiving product introductions and conference appearances.”

Marketing Your Event Planning Business: A Creative Approach to Gaining the Competitive Edge (Wiley, 2004) takes readers through marketability, market development and marketing endeavors (business and personal). Topics covered include diversifying the client base, developing niche markets and areas of expertise, establishing a backup plan for use during downturns and finding innovative ways to solicit new sales.

Time Management for Event Planners: Expert Techniques and Time-Saving Tips for Organizing Your Workload, Prioritizing Your Day, and Taking Control of Your Schedule (Wiley, 2005) offers expert insight on time management as it relates specifically to the event planning and

hospitality industry. Event planning is a high-pressure, around-the-clock job where planners juggle multiple tasks and work down to the wire against crushing deadlines and a mountain of obstacles. For smooth event implementation, and for business success, it is essential that planners manage their own time as expertly as they manage an event. This book will show you how to do just that.

The Executive's Guide to Corporate Events and Business Entertaining: How to Choose and Use Corporate Functions to Increase Brand Awareness, Develop New Business, Nurture Customer Loyalty and Drive Growth (Wiley, 2007) primarily focuses on the strategic event marketing thinking from a business objective perspective, not just an event planning one, and will give the business executives—who are now being held accountable for event results—insight on how to choose, design and use events to achieve business objectives and how to generate a return on their company's investment of time and money. As well, design elements and strategies found in this book will give event planners the tools they need to understand how the events they plan can better meet multiple layers of corporate objectives. This book will give event planners the ability to see the event from their client's perspective as well as from an event planning perspective. Executing events flawlessly does not mean that corporate goals are being met. This book shows not only how to plan and execute the perfect event, but also how, for best results, to closely tie it in to company strategy and objectives. Covered in detail are how to identify clear objectives for each event; which type of function is best suited to meeting your objectives; what you need to establish before forging ahead with organizing committees and reviewing or developing proposals; how to develop a realistic budget, and when to question expenses proposed by staff or professional event planners; the importance of sign offs; how to identify controversial spending and other red flag areas that could seriously damage the company's reputation, or even put it at financial or legal risk; how to establish spending guidelines and policies on employee

conduct at company functions; and how to evaluate the success and results of your business functions.

Confessions of a Event Planner: Case Studies from the Real World of Events —How to Handle the Unexpected and How to Be a Master of Discretion (Wiley, 2009) a fictionalized case study that follows one corporate event planning company around the world. The book showcases fictionalized true-to-life scenarios that upcoming and seasoned event planners and corporate executives may encounter on the job during the actual event execution. This book will help establish and define company policies, procedures and protocol in the office and on-site (that can be signed off on by staff after review), which in turn will help to protect the individual, the event planning company, the corporate client and their guests from legal ramifications. Not knowing what to do when an event planning crisis occurs or steps to take to prevent one from happening can be costly—both personally and professionally—to those involved and to the corporations hosting and orchestrating the event.

Your Stress-Free Wedding Planner: Experts' Best Secrets to Creating the Wedding of Your Dreams (Sourcebooks, Inc., 2004) is a step-by-step approach to minimizing the complexity of planning the wedding day, broken down into the 10 stages used in successful, stress-free event execution.

Plan a Great Wedding in 3 Months or Less (Sourcebooks, Inc., 2007)

There may be many reasons why a couple opts for a short engagement or decides to move up their wedding date. These couples need a planner that helps them prioritize and move quickly to create a great wedding. This wedding planner shows couples how to:

- » Find immediately available sites and choose the right officiant quickly.
- » Prioritize wedding planning so nothing essential is missed or neglected.
- » Explore such quick turnaround alternatives as destination wedding/honeymoon options and elopement.
- » Save money as well as time on every aspect of the process.

Includes all the essential checklists, timelines, worksheets and resources that couples need.

Event planners around the world have asked me to share with them my creative ideas and I will now be able to do that through my upcoming television series and specials, website and other mediums in partnership with Joe Shane through our company 2jproductions (www.2jproductions.com) and Sensual Home Living™ (www.sensualhomeliving.com), building life experiences that will be a ongoing, valuable and creative resource of cutting edge—not cookie cutter—creative and innovative design, staging, custom ideas and life experiences.

Judy Allen

Acknowledgments

Over the course of seven years, due to reader response for the first edition of *Event Planning: The Ultimate Guide* and requests from planners-to-be, planners working in the field and business professionals for more event planning answers, *Event Planning: The Ultimate Guide* grew into a best-selling series of business books that are being used around the world by industry professionals and corporate executives as well as universities and colleges for course adoption and required reading. The books have now been translated into five languages. This well-received series of books then became the crossover platform for two mass-market consumer books—with more to come. My first wedding planner led the way in the wedding planning category sales and received media reviews deeming it to be one of the best wedding planners on the market because of its event planning focus.

Through the writing journey I have been on, I have been fortunate to work with one of the most respected publishers in the industry and to work with those who are masters of their craft. I would like to thank the outstanding team of professionals at John Wiley & Sons Canada, Ltd. for their contribution to the making of this book. I would like to express my appreciation to Robert Harris, General Manager; Bill Zerter, COO;

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I would also like to thank everyone who has reviewed my books and provided such positive comments and feedback. I greatly appreciate the time you have given both to me and to my *Event Planning: The Ultimate Guide* readers by reviewing this book. Your opinions are greatly valued by all of us.

I had the opportunity to write this second edition in the wonderful “active living” town of Collingwood, Ontario. I have to say thank-yous to some very special people who came into my life while living there: Sarah Applegarth MSc, CSCS, CSEP-CEP, SCS, Strength & Conditioning Coach, Active Life Conditioning, Inc. (www.activelifecconditioning.com), whose business is “Taking Care of What Matters Most—You.” Active living, wellness, fitness and health is what Sarah professionally teaches, trains and lives by. Sarah is a world-class high-performance trainer and someone I was privileged enough to call my personal trainer. When I turned to her for expert help in an area that I had no knowledge in, I learned how to develop the physical, mental and emotional strength, stamina and flexibility athletes carry at their core to become their best so that they can do more, give more and bring their best to themselves, their family, their friends, their work (life purpose) and the world. Brianne Law, World Cup Coach for the Canadian Para-Alpine Ski Team (www.canski.org), who joined Sarah in training me this past summer and is an amazing

trainer and teacher. Krista Campbell, Registered Massage Therapist, who is trained in Swedish massage techniques that have a therapeutic effect on the body by acting directly on the muscular, nervous, circulatory and lymphatic systems, promoting an overall feeling of health and well-being, and who has an amazing healing touch and had my muscles back to moving as they are meant to. Dr. Heather Munroe, Chiropractor, Mountain Chiropractic (www.mountainchiropractic.ca), who helps each individual achieve pain relief, injury prevention and personal enhancement through a drug-free, non-invasive approach to health care. In just one session, she was able to undo the damage a fall had done, and brought me back to pain-free alignment and then went on to release years of joint compression caused by years of sitting behind a computer, sitting in an airplane and sitting in meetings in boardrooms around the world. In my book *Time Management for Event Planners*, I shared the importance of having personal and professional balance in life and the value of taking part in all life experiences that present themselves in order to elevate your level of knowledge and creativity. I shared all that I had learned but did not address the area of physical well-being. It was a life-learning, life-challenging, life-changing and growing experience that was still to come and that came about from having a business partner, Joe Shane, who is a seven times Ironman, who honors his commitment to physical well-being, no matter where he is in the world or what his day personally and professionally demands, as do Sarah, Brianne, Krista and Heather (my “fit pit” team) their life partners. Living in an active living community for a year with people committed to health and well-being and surrounded by nature has been an incredible journey and one I am grateful to have experienced. I have learned that there is an amazing benefit to an active living lifestyle personally at home, at work and as you travel around the world on site inspections, fam trips and working programs on-site (and being fueled by nurturing and nourishing foods and fitness workouts, not just caffeine, and meals on the run when they can be fitted in between work deadlines and demands that can be intensive in this 24/7 industry)—and

to bringing wellness, fitness and health lifestyle elements, not only into your everyday and work life, but to the programs that you design so that others can experience the benefits. As you will read later in this book, I feel this will be a very important emerging trend as corporate insurance costs continue to rise due to the effects of sedentary lifestyles, the rise in obesity due to unhealthy eating, and living practices and related illnesses around the world (in the *New York Times*, it was reported that in Japan, workers are required to keep their girth under prescribed limits: 33.5 inches for men and 35.4 inches for women and there is a high personal cost in respect to the quality of life lived professionally with regards to productivity. I share examples of how to introduce this new area, how to apply it by creating multi-tiered event programs and how it has been used successfully by one company to bring about a two-million-dollar yearly return on their \$400,000 investment in a wellness incentive event program. This amazing team I worked out with—mind, body and soul—for over a year would be a great inclusion to any event introducing well-being principles to participants. I would also like to thank Judith Somborac, Personal Direction, Training and Coaching, my yoga and Pilates trainer; and Jackey Fox, Assistant Manager, A&P, Andrea at Collingwood Running Company and Tammy at Becker Shoes. Each played an important part in my fitness mission to counteract years of sitting at the computer. My personal “fit pit” team taught me about nutrition, stamina, strength and stretching—literally, not just physically—as a tool to push past discomfort in all areas of life. They shared their talents and expert knowledge with me, giving me new tools I can use every day for the rest of my life while taking on the world and the world of possibilities in front of me personally and professionally through my company, 2jproductions, with Joe Shane. I am excited to be bringing a new sense of purpose, passion and play to that—for me—which is bringing me closer to my personal, professional (life purpose) and creative best.

As always, I would like to thank my family—my parents, Walter and Ruth; my sister, Marilyn, and my brother-in-law, Hans; and my nieces and