

MENU OF SERVICES

EVENT PRODUCTION/MANAGEMENT



Venue Acquisition

- Venue research to determine the best fit for event based on client priorities and sustainable features
- Negotiate best possible deal, finalize contract and all deliverables
- Act as main point-of-contact with venue staff throughout event planning process



Registration

- Comprehensive management of event registration process from start to finish
- Track registration numbers in Project Report, including comparison to previous year data (if available)
- Registration reports on a monthly/weekly/daily basis as event date gets closer
- Manage all phone calls about registration and other event inquiries
- Print badges in advance of event and ensure VIP groups are identified with special designation (i.e. Speakers, Board, Planning Committee etc.)
- Order all registration related materials, including but not limited to badge covers, badge paper, lanyards with all costs pre-approved by client
- Create badge design for event, to be approved by client



Event Management

- Build and drive a comprehensive event production schedule covering every aspect of planning, execution and reporting within the project scope
- Procure food and beverage contracts that maximize quality, match client priorities and achieve cost savings
- Determine and manage venue and A/V requirements (includes lighting)
- Concept and execute effective event layout, flow of traffic, interactive features and signage placement to achieve maximum attendee experience



Onsite Event Team

- Event team onsite prior to conference for pre-conference meetings
- Provide and manage Social Enterprises event day staff and volunteer corps
- Direct additional event day staff designated by client and vendors
- Set up all aspects of conference, including main stage, exhibit area, educational sessions, and all office and meeting room spaces



Event Reporting

- Once monthly update meetings with entire event team
- Weekly meetings beginning 3 months prior to event with entire event team
- Detailed meeting recap sent after each client meeting, with action items for all team members
- Event Project Report created in Google Drive at start of event with detailed tabs for each event element managed by Social Enterprises.
- All elements of event tracked in password-protected Project Report and accessible by client for reference
- Full event timeline in Basecamp to ensure an on-time project schedule, based on SE best practices
- Client access to Basecamp can be arranged to view milestones, or to have milestones assigned to client contacts if desired
- Creation and distribution of post-event attendee survey (for attendees and speakers)
- Survey data collection requirements and questions approved by client
- Final Event Recap provided 30 days post-event along with debrief meeting
- Extensive PowerPoint/PDF presentation (30+ slides) including a recap of each event element handled by SE (events, registration, marketing, community partners, media partners, programming, sponsorship)
- Includes all data collected by SE via registration and survey results, budget reconciliation, and future recommendations on each event area
- Event files provided post-event via Dropbox



Event Budget Management

- Research and confirm budget estimates for every category of the conference budget
- Create approved conference budget spreadsheet for real-time tracking and reporting for all budget items in password-protected Google Drive Project Report where all event elements are tracked
- Track income and expenses throughout event management
- Reconcile budget with P&L for event reporting purposes
- All event expenses must go through the Event Manager/Project Lead and require written approval from client before being paid. All event expenses are tracked in the budget tab of Project Report in real-time

MARKETING + COMMUNICATION



Event Identity

- Concept and build event brand; including name and visual identity elements (logo, look + feel, messaging)
- Create and maintain event website
- Design a branded email marketing template
- Design event signage and conference program



Event Promotion + Marketing

- Create comprehensive communications plan, timeline and editorial calendar; drive to completion
- Manage media contracts, serve as point-of-contact and ensure timely collateral delivery on behalf of client
- Design and execute promotional campaigns, per pre-determined scope of work
- Interview featured speakers, event founders and key personalities for an event
- Promote event via email marketing to a list provided by client
- Add event to all relevant regional and topical event calendars
- Set-up Google AdWords Campaign at clients request and designated budget
- Integrated website traffic analysis through Google Analytics



Media Relations

- Build three-tier media list for relevant outlets
- Research and acquire well-aligned media partners in all relevant categories (TV, radio, newspaper, magazine, online, etc.)
- Working from the communications plan, develop and distribute event-focused press releases to announce event highlights
- Serve as media contact for event-related press inquiries and manage press in attendance on event day



Social Media Coverage Pre-Event and Onsite

Social Enterprises will provide dedicated pre-event and onsite social media coverage from prioritized social media accounts (Twitter, Facebook, Instagram, etc.) throughout the event, including:

- Creation of pre-scheduled posts thanking key stakeholders & sponsors (TBD and approved by the client)
- Twitter handle compilation of all speakers, special guests, sponsors and exhibitors
- Summary of direct engagement activity recorded on social media accounts for the duration of the event



Event App Management

The SE team to manage full review of event app options and manage upload and coordination of implementation for the following services provided with selected app:

- Agenda with session descriptions
- Sponsor page with logos linking to their websites
- App sponsor logo feature
- Speaker profiles showing which session they are speaking in
- Live polling with projection - the ability to have several polls running simultaneously
- Attendee contact information exchange/messaging
- Push notifications for event announcements



Community Partner Program

- Work with the client to determine industries, sectors and specialty groups that engage with the event's target audience
- Design a Community Partner Overview, which outlines the event mission, benefits and commitments that come with participation in the program
- Actively manage relationships and execute on all deliverables (e.g., providing promotional materials, posting logos, posting relevant community partner news & accomplishments to social media outlets, distributing discount and comp codes, etc.)
- Create and deliver customized promotional materials
- Track and report on success of community partners to the bottom line of the event via direct ticket sales (measured by discount codes) and awareness metrics (measured by questions during registration process)
- Analyze collective results (surveys, sales, estimated reach, professional observations) and make recommendations for improved success moving forward



Stakeholder Engagement

Social Enterprises will directly engage key event stakeholder groups with 1:1 outreach for the event offering to create custom promotion and marketing promoting their involvement and support of the event for them to send out to respective stakeholder marketing groups/lists. Key event stakeholders typically include:

- Board of Directors
- Advisory/Programming Committee
- Speakers
- Confirmed Sponsors and Partners

PARTNERSHIP



Sponsor Acquisition and Confirmation

- Work with client to determine partnership strategy and goals
- Research, contact and acquire cash sponsors and exhibitors per client-approved target list



Sponsor Contract and Invoice Process

- Create or update custom sponsor/exhibitor contract and invoice for all event confirmed sponsors
- Track all sponsor confirmations, contract/invoicing status and all marketing deliverables in real-time in confirmed sponsors tab in even Project Report
- Secure all deliverables per sponsor contract to include sponsor logo and Website link to add to promotional advertising, emails, program, signage and sponsor reel (rotating on all screens at conference)



Tradeshow Management

- Tradeshow Manager to develop and distribute Sponsor/Exhibitor Manual/Set-Up email to exhibiting sponsors 30-45 days pre-event
- Manage all pre-event and onsite communication with tradeshow participants to ensure set-up and break-down is 100% smooth process
- Confirm registration of sponsor/exhibitor passes
- Call-down 2 weeks prior to event to ensure that all sponsor/exhibitor passes are in
- Assign layout based on sponsor/exhibitor level and electrical needs with final layout approved by client
- SE team to staff and manage Tradeshow onsite support

PROGRAM DEVELOPMENT + MANAGEMENT



Management of CFP Process

- Create a Call for Proposals (CFP) guidelines document and submission form, including priority program topics, speaker and content requirements, pre-event timelines, program objectives and client vision and mission.
- Manage all proposal submissions and communications throughout CFP submission process.
- All CFP submissions will be collected via Google Forms, and feed directly into the project report in Google Docs with 24/7 client access.
- The Google Doc tool provides a central storage space to categorize and efficiently organize all CFP data. Proprietary information is kept safe with locked function allowing only select contributors' access to view and/or edit spreadsheets.
- CFP review and synthesis with client to establish priorities and or missing content from the CFP process to build the most complete and effective program possible.



Speaker and Session Development

- Work in collaboration with client to evaluate CFP data, summaries and recommendations to develop full content plan, program skeleton and session topics.
- Work in collaboration with client with keynote speaker target research, speaker inquiries, interviews and acquisition.
- Work in collaboration with client to curate additional breakout speakers to fill holes in programming where necessary.
- The Google Doc tool supports efficient sharing and communication of CFP knowledge, speaker invitation and confirmation status and all program and speaker management details.
- Work closely with confirmed speakers to ensure speaker presentations, panel speaker groups, and session concepts are aligned with client's mission, vision and learning objectives. This may include emails with template information, group conference calls, and/or individual speaker coaching calls.



Speaker Management

- Develop and manage all speaker confirmations, outlining speaker details and commitments.
- Manage all communication with confirmed speakers and speaker handlers, including acquisition of bio + headshots for posting on event website, collection of speaker presentations and videos, management of pre-event Q/A, and sending post-event email thank-yous.
- Schedule pre-conference planning calls to be led by session moderators. Hours included for SE to lead 10 select calls that need extra attention.
- Manage all onsite speaker relations, including run-of-show timing, stage management handling and speaker briefing, and all other day of event details.
- Draft emcee script out line for main stage sessions with run of show and logistical notes (emcee or client to add in personalized remarks/reflections).

EVENT SUSTAINABILITY & CSR



- Create and manage a sustainable event management strategy and minimize the event environmental footprint
- All products should be made from post-consumer recycled content, upcycled, non-toxic, chemical free, and/or eco-certified.
- Materials used should be provided in ideal quantities to avoid waste. Excess items should be donated, composted, and/or recycled.
- Food and beverage selections should be local, organic, and sustainably sourced whenever possible. All excess food and beverage should be donated and/or composted.
- All services are sustainable event management practices and include tri-waste stations, paperless ticketing system, and other CSR initiatives.
- Use local suppliers when possible who are deemed conscious of their social responsibility
- Zero-waste management efforts are implanted with materials reduction and re-use
- SE team to partner with venue and waste management partners to establish a zero-waste plan for attendees and back-of-the-house waste streams. Ensure proper volunteer and staff education and public-facing signage is provided. Work with venue to calculate waste stream percentages.
- SE to manage event and attendee offsets, RECs, and WRCs via a 3rd party provider (e.g., Bonneville Environmental Foundation). Provide Alliance with offset calculations for inclusion in the post-event report.

VIRTUAL EVENT MANAGEMENT



We can help to update your in-person conference/impact event into a virtual event where you may be able to reach an even larger audience. We have an expert team ready to help answer your questions about converting to a virtual event.

Below are an example of resources Social Enterprises can provide for your switch to a virtual event:

- **Production Team:** We can provide resources for virtual host location, create your virtual run of show and host emcee script, manage your virtual event production schedule and timeline; manage and implement required audio-visual needs including filming/streaming program out to audience in controlled, high quality environment; event manager onsite to deliver successful event schedule and financial summary
- **Registration Team:** Create and manage virtual event registration including managing event assistance, inquiries and regular registration/attendance reporting
- **Program Team:** We can convert your in-person conference/impact event program into virtual event sessions with same speakers and content deliverables
- **Communications Team:** We can craft effective communications to attendees, stakeholders and sponsors for email, print, website and social media channels
- **Sponsorship Team:** Our sponsorship team can update your sponsor packages and deliverables to translate effectively into a virtual format to ensure a seamless transition

CONTACT

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