In this document I will outline the step-by-step process of conceptualizing and planning my project. My primary aim was to enhance my proficiency in excel and optimize my knowledge and understanding on event planning/project management through practical application. Though this remains a personal project, I have compensated by envisioning potential challenges and formulating contingency strategies, ensuring project success, despite unforeseen obstacles.

I started off my project writing a creative objective list of all the things I wanted to include in my project. The list consisted of “a meal, books, author speeches, socialisation, and community.” These became the foundations of the event I was to create and plan.

I then made those keywords into something a little more specific and I created a more defined event with structured purpose and objectives. The event was to become an opportunity for book enthusiasts to come together and socialise, make friends, share book recommendations, and enjoying a brunch together before some chosen authors came out to answer questions and talk about their latest work.

Next, I chose to determine the scope, budget, and timeline. For the scope I created six different categories (event venue, brunch menu, seating arrangements, author presentations, event promotion, and logistics & decoration). For structure further into the project, I came back to use these six categories regularly. Next to each category I wrote a summary of what I would specifically need from them (for example, event venue - suitable venue with adequate space for seating, dining, and presentations).

Next, I went onto budget. I done some research online and found some estimates based off location/quantity and quality. I wrote out a draft budget of £7000 including a 10% total budget contingency.

I then went on to timeline. I took a look at my 6 categories and made note of what I need to do for each, how long it will take and how far in advance I need to sort them, for example three months prior I must secure the event venue and confirm a date, finalise the brunch menu and catering arrangements, identify and invite authors to participate, and develop event promotion strategies.

The scope, budget and timeline further helped to provide a structured framework for planning and executing the books and brunch event, ensuring all aspects are carefully considered and managed.

When choosing the authors, I relied on 5 main points. Relevance, audience appeal, diversity, availability, and networking opportunities.

For relevance, I made sure I chose authors whose work aligned with the interests of my target audience and the theme of the event, looking for authors whose books are popular or have received critical acclaim in the relevant genres.

For audience appeal, I considered the appeal of each author to your target demographic, looking for authors who have a strong following or fan base, as they are more likely to attract attendees to the event.

For diversity, I aimed for a variety in author selection, including authors from different backgrounds, perspectives, and literary genres. This ensures a varied and engaging event that appeals to a wider audience.

For availability, I made sure to check the vacancy of authors and their willingness to participate in the event. I prioritized authors who are flexible and enthusiastic about engaging with readers and attending literary events.

Last of all, for networking opportunities, I considered authors who may offer additional networking opportunities, such as book signings, to enhance the overall event experience for attendees.

For event promotion strategies, I chose three methods which I feel would promote this event best.

One of which being distributing pamphlets at local bookstores. This is an effective strategy to target book enthusiasts who are likely to be interested in attending the Books & Brunch event. Bookstore customers are already engaged in literary activities, making them a prime audience for promoting the event.

The second promotion strategy was posting the event listing on popular online platforms such as Eventbrite, Meetup, or local community websites. This expands the event's reach to a wider audience, attracting attendees who may not frequently visit physical bookstores but are interested in literary events.

The last strategy was partnering with local book clubs to allow targeted promotion to a highly interested audience of readers. Book club members are likely to share similar interests and may actively participate in events related to literature, making them valuable allies in spreading word-of-mouth promotion and driving attendance to the event.

I started to plan the spreadsheet of info I would need to track. I used a data set for the guest list, which I extracted from Kaggle. I cleaned and processed the data, adapting it to meet the needs and requirements of my personal project.

Next, I listed the information on excel including guest list, budget, vendor information, task list, timeline, seating arrangements, emergency contacts, and equipment and logistics, giving each variable its own sheet. Next, I added more information for example, on the budget sheet I added expense item, cost, and payment status, using basic formulas including SUM, VLOOKUP, and conditional formatting to analyse my data.

A screenshot of a computer

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To ensure that my dataset was accurate and to test that my formular was correct, I used conditional formatting. I checked for duplicates using the smaller table to the side, however, I only had the intention of checking author RSVP Status. I noticed that the name “Carl Wright” was now highlighted, indicating that in my dataset I had done a duplicate of a guest. I removed the duplicate, ensuring the datasets accuracy.

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I then formatted all my data to make it organised, accurate, and consistent. I also added a slicer to my table, to help me filter my data more easily. Another tool I added was freezing my headers. This helped simplify my table.

Up next, I started the planning process. To do this I gathered requirements and created a project plan. I went through the six categories that I had composed at the beginning of this project and wrote the requirements for each, for example the brunch menu needed diverse options, catering to different dietary preferences and requirements. It also needed quality and freshness of food items, and efficient catering service to ensure timely delivery and replenishments.

For the project plan I went back to the six categories once again and wrote a more detailed task list, combining the details from scope, timeline, and requirements.

Next, I identified my resources and dependencies I may need, for example for resources I needed venue staff, authors and speakers, promotional material, and audiovisual equipment rental.

As for dependencies, I went through timeline and project plan making notes on what might affect what, for example, the venue booking must be confirmed before finalising catering arrangements and event logistics.

I then developed a more accurate budget, this time while looking up the costs I have more details on the event and was able to work out prices a little more accurately. If I was to do this project again, I would rearrange the order in which I done my budget. Although it was good to have a rough estimate early on to see if this event was realistically affordable, I hadn't accounted for a lot of extra costs, which caused me to completely rely on my contingency budget, causing the project to become unsuccessful. While finalising the budget, I considered equipment rental at the venue space such as tables and chairs, travel expenses for the authors, online event registration platforms, and a new contingency (10% of the total budget).

For resource allocation, I went through the project plan and took note of who would be allocated to each task for optimum performance. For example, venue staff would assist with the venue set up, the logistics and the coordination on the event day.

The next thing for me to do was to execute it. However, this being a personal project I opted to create hypotheticals as to what might happen to try to counteract any problems that may occur.

The project hypothetically faced a setback when prices increased beyond the allocated budget, risking its success. To improve this, I revisited the planning phase, seeking cost-effective alternatives for venues and catering services. Through research, I found more affordable options without effecting quality, successfully bringing the project's expenses back within budget.

Another potential challenge emerged when one of the authors had a transportation issue, with their train cancelled due to track closure. Swiftly, I arranged for a contingency plan, organizing a taxi to transport them from the station to the event venue. Despite the unforeseen increase in expenses due to unused train tickets and additional taxi fare, the proactive solution ensured the author's timely arrival, averting any disruption to the event schedule.

Another potential problem could be logistical challenges, such as insufficient space for attendees, leading to discomfort or difficulty in accommodating everyone. I counteracted this by identifying potential overflow areas within the venue that can accommodate additional attendees. I also ensured that we kept extra seating, tables, and equipment on standby to quickly set up additional seating arrangements in case of unexpected surges in attendance. I made sure to communicate the contingency plan to event staff, providing clear instructions on how to implement alternative arrangements if needed.

Another issue that may occur is that one of the authors keep their RSVP Status as “Pending” long after we needed to finalise the attendee authors. She is a very popular author and could attract a lot of attention to the event, however, currently she can neither confirm nor deny her RSVP status. To overcome this hypothetical issue, I decided to develop a backup plan with additional talks, activities, or presentations that can be integrated into the event timeline if the author is unable to attend. This ensures that the event can proceed smoothly and will not finish early, and attendees can stay engaged.

Something that went well in my project was that I successfully applied the Excel formulas and functions I had learnt including SUM, conditional formatting, and VLOOKUP, to efficiently organize data, analyse expenses based on the research I done, and generate insightful reports, enhancing project management proficiency and decision-making capabilities.

Another thing that went well was my documentation of expenses, schedules, and timelines which successfully structured the event and became a reliable source for me to go back to and reflect on, fully understanding why I had made the choices I had.

One more thing that went well was my proactive identification of potential issues, which allowed for the development of effective contingency plans, ensuring readiness for any setbacks.

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If I was to do a similar project, I would use the knowledge I leant from practical experience to make subtle changes to the execution process. One of which being audience analysis. I believe that the project would have been able to be better if I had conducted surveys or marketing research to help me better understand the preferences and expectations of the target audience which could have provided me with more information when making decisions and supported me to better tailor the event to better meet their needs, resulting in higher satisfaction and attendance.

Another thing I would have done differently was the cost analysis. Conducting a thorough budget research to anticipate all potential expenses, including hidden costs such as permits, insurance, and legal fees, would have provided a more accurate financial forecast.

The last thing I would have done differently was utilizing more sophisticated excel tools to encourage speed, progress tracking and enhance overall project efficiency. I would have like to incorporate more data visualisation methods such as charts, graphs, and dashboards earlier in the planning process which could have facilitated clearer analysis and presentation of the projects data and aid decision-making.

The total expense outcome after the planning came to £6843, while still having £668 worth of contingency included in that price. So far, we were below our target budget, making the event successful. During the event, we had a couple issues, causing us to spend an extra £40 for author transportation, as well as £50 for extra equipment (tables and chairs). However, this only subtracted £90 out of the contingency budget, resulting in the total cost of the event being £6265 once the contingency budget was subtracted.