MODULE 4

Part 2: Event organisation and project management

Table of contents

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Learning Outcomes:

LO3: Choose how to formulate and plan activities to meet objectives, budgets, and outcomes.

LO4: Select the tools that aid in planning events.

LO5: Identify the critical success factors in event planning and project management.

1. Introduction

When setting out to hold an event of any size, it is essential that all the activities and arrangements are implemented at the correct time and that everybody involved in planning and executing the event knows what they are required to do at a particular time and date. The effectiveness of the organisation and management of the event are critical to its success. This is where project management (the process of managing the implementation of an event plan and the development of the event) comes in (Wanklin, 2010b:144). The main aim of project management is to ensure that a project is realised within the designated budgets and time frames.

2. Planning and coordination tools

Event managers can make use of a number of tools to assist them in the planning and coordination elements of their job. Technology such as computers, laptops and, more recently, iPads and smartphones are important planning tools, allowing event managers to keep records, develop spreadsheets, design site layouts, make detailed notes, and correspond via email with clients and suppliers. Advances in computer technology has also resulted in the birth of an array of programs that assist with project management aspects such as drafting layouts and site maps, and geographical information systems that can be used in drawing and design (Wanklin, 2010a:121).

Due to the nature of the event industry, the event manager is out of the office frequently, and often attends site meetings or meeting with clients. Therefore, it is imperative for them to have a mobile device that can send and receive emails and access the internet when they need it. Technology certainly aids the event manager in planning and also allows them to always be in touch and contactable, which is vital.

Smart tip:

Invest in good design software in order to design layouts and maps in-house. Clients often demand visual interpretations of ideas or budgets. It helps them to imagine what the event is going to look like and what the spatial elements of the event will be. Drawings should always be done to scale.

Technology aside, there will always be important thought processes and information exchanges between parties needed that will aid the planning process. Interaction and effective communication is essential, as much can be learned by allowing people to interact and collaborate. Holding workshops, discussions, focus groups, or brainstorming and mind mapping sessions can facilitate this interaction (Wanklin, 2010:121). To get the most out of these, they should be structured and have a clear agenda and list of desired outcomes.

Mind mapping is an effective planning tool. It is used when a group of people meet to brainstorm a certain idea or issue, which is then drawn into an informal picture with linkages related to a central theme (Wanklin, 2010:121). Mind mapping and brainstorming also encourage creativity and generate ideas. Bouncing ideas off colleagues is a great way of coming up with new ideas and helps to move the creative process along a lot faster.
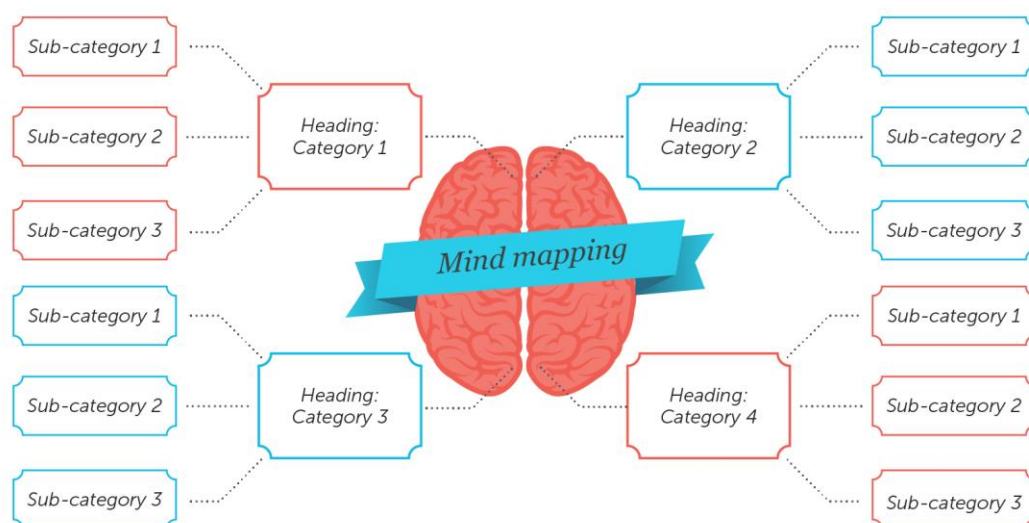
Figure 1: An example of how to create a mind map.

3. Key factors of effective planning

Effective planning is one of the first steps in ensuring that an event is staged successfully. Wanklin (2010a:122-123) outlines a few key items that are needed to facilitate successful event planning:

- A clear, detailed and systematic planning brief.

- Active participation by the local community in the planning process, and thorough consultation with all stakeholders throughout the planning process (this generally applies to larger-scale public events).

- An experienced organisation, organising committee, or event manager with strong leadership skills to head the planning process.

- A multidisciplinary planning team headed by a principal manager who is responsible for overall team coordination and performance.

- A well-balanced event programme containing at least one unique main attraction and a number of other relevant, carefully-selected attractions and activities.

Smart tip:

There needs to be one main event manager who is responsible for the event as a whole and who can make final and definitive decisions where necessary. For a successful event outcome, there should be more people executing decisions than making them.

3.1 Ticketing

Interest in an event must be managed efficiently and effectively, and interest must be converted into ticket sales and attendance. Use as many outlets as possible to sell tickets, and ensure that it is not difficult for potential participants to purchase tickets. A central computer with a special program such as Ticket Pro could help to manage the sales.

The event manager needs to decide whether tickets will be sold at the door. Selling tickets at the door can be tricky, as it can be difficult to accurately estimate, and cater to, demand. It is, therefore, risky to rely only on ticket sales at the door. The restrictions and population certificate issued for the venue need to be taken into account when selling tickets. Keep in mind that contingency planning for an open event is different to planning for a pre-booked event, and considerations such as under-selling and over-selling (and which of these is most likely for a given pre-booked and open event) need to be taken into account.

Tickets can be exchanged for wristbands upon entry as part of the accreditation process. Ticketing is a way of control management and allows for better planning.

Ticketing at mega-events: The 2012 London Olympics

The larger the event, the more efficient and organised the ticketing system needs to be, and on a mega-event such as the London Olympics where millions of tickets are sold to the public, event organisers need to ensure that the best possible ticketing, selling and distribution systems are put in place.

For the 2012 London Olympics, organisers outsourced their ticketing services to TicketMaster, and divided ticket sales into different phases spread over a few days (the initial bidding phase started in 2011, after which sales closed until May 2012, reopening on 11 May for 7 days). The decision to spread ticket sales over multiple days assisted in preventing system crashes due to overloads that occur when there is a rush for tickets.

Careful planning and partnering with reputable companies that possess the necessary infrastructure and skills was key in ensuring a smooth ticketing process for the 2012 London Olympics.

(Shone & Parry, 2013:250-251)

Online booking can be very effective and also serves as a good source of marketing information about the event demographic. How potential guests are invited to an event will depend on the target audience, what mediums they like to use and what the best way of reaching them is. For example, consider the different avenues of communication that would be used to reach the target market for an exclusive charity ball vs a four-day electronic music festival.

There are a number of details that should appear on an event ticket. Figure 2 illustrates an example of what some of these details are.

- TICKET FRONT SIDE -
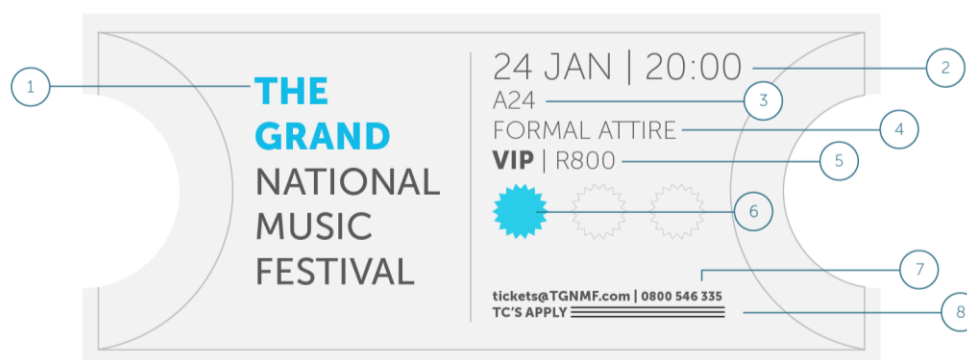
1	Name of the event	5	Price and type of ticket
2	Date and start time	6	Colour coding (if applicable)
3	Sequential number	7	Contact number and web address
4	Dress code	8	Conditions and disclaimers

Figure 2: A ticket should contain all the relevant details pertaining to the event.

4. Event project management

Event project management is similar to event planning and coordination, but it tends to focus on delivery to a greater extent. Project management in an event management context is, according to Wanklin (2010b:144), "the process by which the implementation of a plan and the development of an event are managed". Project management is essential as it makes sure that all the activities and arrangements are implemented at the right time and that everybody knows what they are required to do at a particular time and date.

Project managers should always aim to implement SMART objectives when working on a project. The goals should be:

- **S**pecific

- **M**easurable

- **A**chievable

- **R**elevant

- **T**imely

(Shone & Parry, 2013:242)

This is a useful acronym for remembering the key objectives of planning.

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4.1 Characteristics of a project

By their very nature, events (much like projects) have to be classified as short-term occurrences in that each event is a unique and time-limited operation. Even annual events will be different in terms of their look and feel and specific activities each year (Shone & Parry, 2013:242). There are also other similarities between managing projects and events, as many techniques originally developed to manage large-scale building, logistical and public projects are used to organise events.

Due to their unique nature, projects and events are usually characterised by the following:

- A set start and finish date

- A dedicated time frame

- A unique (once-off) operating period

- Contributions from several different groups or teams

- A given set of resources

- Scheduled activities set out sequentially in order of occurrence

(Harris 1998, cited in Wanklin, 2010b:145)

There is usually one project manager on an event, although large-scale events may have more than one, each managing a certain area. A key characteristic of the project management team is that it is multidisciplinary in nature; individuals and groups with diverse skill sets and areas of specialisation within the event industry join together to work on bringing the event to life.

Video 1: This video showcases a Paul Nasr mega-wedding and highlights the complexity and coordination needed between different teams and functions to successfully create an event of such magnitude. (Source: https://www.youtube.com/watch?v=5luUDQouTTs)

4.2 The project management process

The purpose of project management in an event management context is to ensure that an event is delivered within the allocated time frames and budgets (Wanklin, 2010b:144). Project management normally follows a five-step process:

1. Initiating

2. Planning

3. Executing

4. Monitoring and controlling

5. Closing down

Table 3 outlines the similarities between event management and project management activities.

Table 1: Comparison between event management activities and project management activities. (Source: Adapted from Shone & Parry, 2013:243)

Event Management Activities	Project Management Activities
Objectives and getting started ↓	Conception ↓
Planning ↓	Definition ↓
Organising and preparing the event ↓	Production ↓
Implementing the event (running the event) ↓	Operations ↓
Legacy projects linked to the event ↓	Handover or divestment ↓

The aim of project management is to reach specific targets as stipulated by the owner of the project or event. Each event differs in scope and complexity, but regardless of these differences, the following activities need to take place in order to manage all the aspects of the project successfully (Harris, 1998 cited in Wanklin, 2010b:145):

- A clear project goal must be established.

- Project objectives should be determined.

- Milestones and all tasks to be performed, as well as a clear link between tasks and time frames, must be established.

- A project plan diagram should be prepared.

- People should be guided on an individual basis and as part of the broader team.

- The project leader must support and encourage team members' dedication and enthusiasm, and motivate them as they work on the event.

- Relevant and timely information must be distributed to all the project role players.

- The team should be empowered to perform effectively.

- Risks should be managed and creativity should be encouraged in order to motivate the team to find innovative ideas and solutions to challenges.

Project management requires special qualities to handle stressful and complex situations as they arise. Project managers should have a diverse skill set and experience with leadership ability. They need to be proactive in their approach and diplomatic in many situations.

4.3 Event development programming

Constructing a programme to manage the development of an event from start to finish can be summarised in six basic steps, as outlined in Table 4.

Table 2: The six steps of event development programming. (Source: Adapted from Wanklin, 2010b:147)

Development programming steps	
1. Set objectives	Review the event objectives in terms of the plan that has been prepared.
2. Schedule	Break the event down into manageable parts, and further break down the parts into detailed sets of activities and related costs.
3. Assemble resources	Formulate requirements for implementation relating to human resources, equipment and services.
4. Draft a programme	Assign time sequences and durations to all activities.
5. Manage the project	Use the detailed networks of activities to help manage the implementation of the event.
6. Monitor and review	Continually review and monitor the performance of the implementation process compared to the goals and objectives, time and costs allowed.

Working in a global marketplace that is characterised by rapid change, fierce competition, increasing costs, and a growing complexity of consumer demands and tasks to be performed, event managers have to work strategically and efficiently to draw up each component of an event development programme in a professional manner (Wanklin, 2010b:146). Event managers have to aim to minimise costs and risk, manage the complexity presented by each task, and exceed client expectations at each point in the process.

In the event management context in particular, project managers need to ensure that the following items fall into place during the programming phase in order to successfully stage an event:

- **Event organiser commitment:** There needs to be "buy in" from the group responsible for organising the event and its management team.

- **Thorough scheduling:** A realistic and well-defined schedule of activities aligned to a critical path should be put in place.

- **Reporting lines:** Decision-making lines of communication, and authority structures within the project need to be clearly defined.

- **Team commitment:** It is important to have a well-motivated, driven, and supportive team that is willing to cooperate with the project manager.

- **Flexibility:** The project team and event organiser need to adopt a flexible mind-set in order to deal with changes.

- **Project management integration:** The project management component of the event needs to be brought in early in the planning and conceptualisation process; the earlier the project managers are involved, the easier it will be for them to make realistic plans regarding event completion time lines for each phase of the process.

- **Function documents:** The documentation used in the project planning process needs to be detailed and well prepared.

- **Review and monitoring:** The project manager should continually review and monitor aspects such as quality of outputs, performance, and actual expenditure against budgeted expenditure.

- **Clear communication to stakeholders:** Stakeholders should be involved in each step of the process and be kept up to date through effective information distribution, meetings, and clear action plans.

(Wanklin, 2010b:159)

4.4 Project management techniques

Once the specific objectives of the event have been clearly defined, there are a number of techniques that event managers can adapt from project management in order to manage their event programming. These are outlined in the following sections.

4.4.1 Work breakdown structures

A work breakdown structure involves breaking a project or task down into different component parts in order to identify what needs to be done at each stage of the project. This breakdown is a broad outline to determine what needs to be done by each team or individual. Details of each activity are not necessary at this stage. Its hierarchical layout (as depicted in Figure 3) resembles an organisational chart, and the breakdown is organised with the major event (for example, a wedding) starting at the top, with each subsequent level breaking components of the event down into smaller parts to arrive at a team responsible for each part (Shone & Parry, 2013:244).
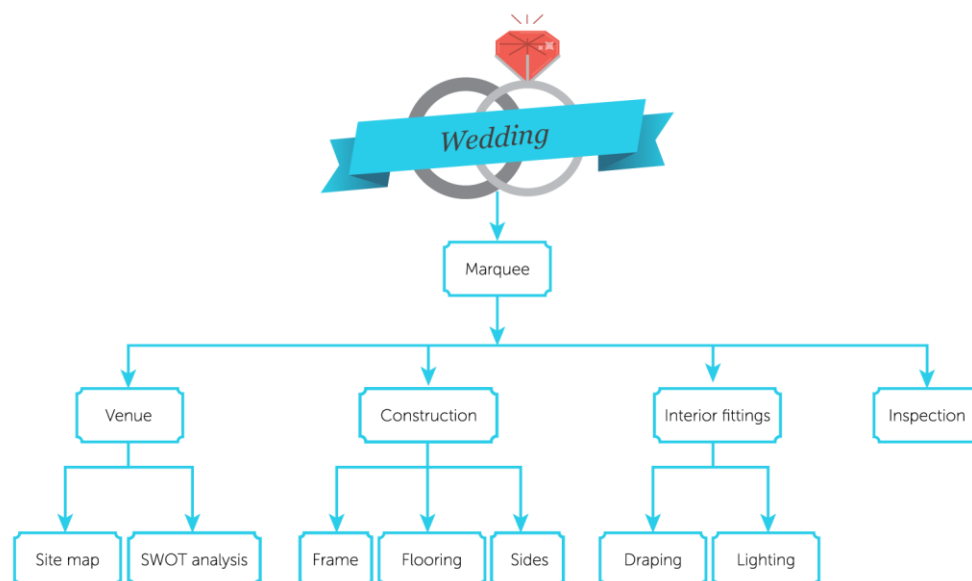
Figure 3: An example of a work-breakdown structure. (Adapted from: Shone & Parry, 2013:244)

4.4.2 Critical paths and schedules

After a work breakdown structure has been drawn up, event managers will be able to identify the activities that are critical to the event's success. A critical task is any task that must be completed first in a sequence of activities in order for other activities to proceed. For example, if one task is to secure a venue, and another task is to decorate the venue, the task of securing the venue is a critical task, because the venue cannot be decorated if it has

not been secured, whilst the task of decorating the venue is called a dependency, as its commencement is dependent on the critical task's completion.

Identifying critical tasks serves as a way of keeping track of project timelines and deadlines, because critical tasks need to be completed timeously in order for other activities to take place (Shone & Parry, 2013:244).
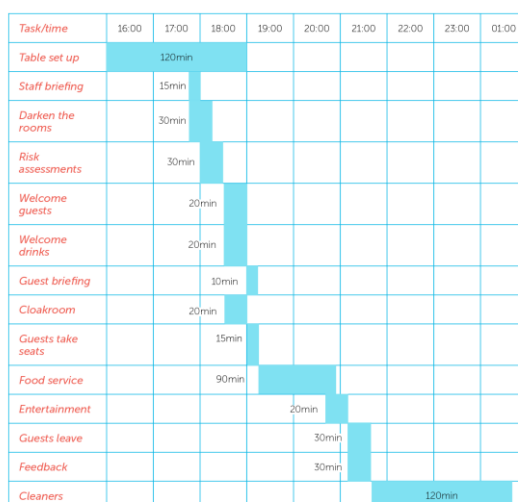
It is generally accepted that the more external dependencies (dependencies that are not within the event manager's direct control) a project has, the greater the risk of project failure (Shone & Parry, 2013:245). Large events tend to have considerably more external dependencies than smaller events. Event managers can keep track of all the critical tasks and dependencies using software such as Microsoft Excel, Smartsheets, or Microsoft Project.

4.4.3 Gantt charts

A Gantt chart is a simple chart that plots tasks in a time-sequence order, allowing the user to see which tasks need to be completed in what order, and where certain task timelines overlap (Shone & Parry, 2013:245). The chart gives project managers and each team involved an indication of how long they should take to complete a certain task, and what the ripple effect on other tasks will be if one task is delayed.

Gantt charts are useful to indicate what tasks still need to be completed, and if there are any time clashes between different tasks. A limitation of this chart, however, is that it does not indicate whether there are sufficient resources to complete each task, or if the individual allocated to the task has been assigned too many responsibilities based on their capacity (Shone & Parry, 2013:245).

Gantt charts are easy to prepare, and a simple software tool such as Microsoft Excel can prepare excellent Gantt charts. Figure 4 depicts an example of a Gantt chart for a formal dinner event.

Task/time	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	01:00
Table set up		120min							
Staff briefing		15min							
Darken the rooms		30min							
Risk assessments		30min							
Welcome guests		20min							
Welcome drinks		20min							
Guest briefing			10min						
Cloakroom		20min							
Guests take seats			15min						
Food service			90min						
Entertainment				20min					
Guests leave				30min					
Feedback				30min					
Cleaners						120min			

Figure 4: Example of a Gantt chart.

> **Risk assessment:**
>
> An event, just like any other project, is subject to certain risks, and it is important for event managers to plan and anticipate potential risks before executing their plans.

4.5 Managing project stakeholders

According to the Project Management Institute, stakeholders refer to:

> Persons or organizations (e.g. customers, sponsors, the performing organization, or the public), who are actively involved in the project or whose interest may be positively or negatively affected by the performance or completion of the project.

> (Project Management Institute, 2008:23).

Stakeholders will have different levels of involvement in a project, and some are more influenced by, or able to exert more influence over, the project. For example, when planning a music festival, the managers of the various artists that will perform will be able to exert more influence over the festival schedule than the local community would, although both groups would be classified as stakeholders.

> In a Project Management Institute white paper entitled "Engaging Stakeholders for Project Success", David Miller and Mike Oliver (2015) set out a three-step approach to managing stakeholders effectively. The steps are:
>
> **1. Build a stakeholder map:** Identify all the stakeholders involved in a project and create a chart to graphically represent all the stakeholders, focusing on the political (as opposed to organisational) structure to determine the relationships between the stakeholders and the influence each stakeholder group has on the success of the project. Each stakeholder must be clearly defined and assigned a role.
>
> **2. Prioritise key stakeholders**: Once stakeholders have been clearly defined, it is important to identify how much power (to assist or hamper change) each key political stakeholder holds, and how their influence and commitment to the project will influence the project's success. Stakeholders can be grouped into primary and secondary categories based on whether the stakeholder's action will have a direct or indirect effect on the project's success. (Page 13 of the white paper outlines a matrix that project managers can use to group key stakeholders according to their level of influence and commitment to the project.)
>
> **3. Develop key stakeholders:** Project managers need to develop action plans for stakeholders to ensure that each stakeholder fulfills their functional position within the broader project and to ensure project success. This plan will be based on the project manager's identification of the stakeholder's position and influence outlined in the stakeholder map.
>
> (Miller & Oliver, 2015)

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The larger the project or event being planned, the greater the degree of risk and uncertainty, and event managers require a specialised set of skills to coordinate and build relationships with all the stakeholders involved, anticipate potential problems, make swift decisions, monitor performance and put forward suggestions for review where needed (Wanklin, 2010b:145). Effective relationship and stakeholder management is especially important in the beginning phases of a project, as it is at the beginning of a project that the degree of stakeholder influence, project risk, and uncertainty are at the highest (Project Management Institute, 2008:17).

4.6 Project evaluation

Upon completion of a project, the project manager is required to oversee the project breakdown and evaluate the project's success based on the objectives that were set out at the beginning of the project (Wanklin, 2010b:158). The success of the project can, in large part, be determined by the outcomes relative to the costs incurred in achieving those outcomes.

Project evaluation and success in an event management context can be a challenging task, especially if it includes obtaining feedback from event attendees, because people often tend to leave events in a rush and do not always take the time to complete surveys and questionnaires. Survey-based feedback is also very subjective in nature, because a guest may have a distorted perception of an event based on their personal state of mind or emotional state at the time of the event (Wanklin, 2010b:58). Despite these challenges, event managers should still endeavour to obtain feedback and complete the evaluation process, as it will assist the event manager in planning for future events.

Parry and Shone (2013:213) explain that the quality of survey feedback can be greatly enhanced by planning well-structured surveys with clearly articulated, targeted questions based on key aspects of the event. (Open-ended questions such as "Did you enjoy the event?" should be avoided, as they tend to produce vague answers, for example "Yes, it was alright" that cannot be meaningfully analysed to identify trends.) The questionnaires could also be emailed to guests to increase response rates, and it is useful to consider creating questionnaires for other stakeholders such as organisers, sponsors, and suppliers to gain insight into their perception of the event. It is also useful to make use of a "mystery guest" to attend the event and fill out a report covering all the aspects of the event. The more perspectives an event manager has of how different groups experienced the event, the better informed their decision-making for future events will be.

Visitors attending a 3 day festival in Cape Town Questionnaire

Day .... Time ....

1. Where is your residence?................................ Region/province ....

2. a) Are you staying over in the area? Yes or no

   b) If so, what accommodation are you using?

   Hotel ⬜ B&B ⬜ Friends/relatives ⬜ Campsite ⬜ Flat ⬜

3. Number of people in your group.

   Adults ⬜ Children ⬜

4. How much do you plan to spend at the festival? R..............................

5. How long do you plan to stay at the festival? ....days

6. How did you hear about the festival?

   Newspaper ⬜ Radio ⬜ TV ⬜ Brochure ⬜ Poster ⬜

   Magazine ⬜ Word of mouth ⬜

7. Please rate how well the festival met your expectations.

Excellent ⬜ Good ⬜ Average ⬜ Below average ⬜ Poor ⬜

8. Please give your comments or suggestions (to improve the festival)

....

....

Thank you

Figure 5: An example of a feedback questionnaire.

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Table 3: Types of information for evaluating events. (Adapted from: Shone & Parry, 2013:312)

Types of information for evaluating event success	
Quantitative information	*Qualitative information*
Visitor and participant data, sales	Visitor perceptions
Target market (obtained from visitor profiles)	Questionnaires and surveys
Attendance statistics	Recorded discussions (structured) or interviews
Financial reports or accounts	Staff and volunteer feedback
Financial balance sheet	Management notes
Economic impact analysis	Social impact analysis
General statistical information	Social benefits balance sheet

Mandy Mulder interviews Margs and Maria Van Tonder, Mushroom Productions:

Tell us a bit about Mushroom Productions.

"We have offices in both Cape Town and Johannesburg. Desti Loeijs started the company approximately 20 years ago. We have five permanent staff members in our Johannesburg office, and five in Cape Town. Skills vary from production managers, stage managers, and site coordinators to draftsman, technical directors, logistics managers and accountants."

What types of events does Mushroom Productions work on?

"We handle all types of events, from large-scale live international music concerts to corporate functions, car launches and even weddings and birthday parties. We also run a technical band management division, which is called Mushroom Management. At the moment, some of our bands include The Parlotones, Die Heuwels Fantasties, Prime Circle, Jack Parrow, and Aking. Mushroom Productions also has a safety branch called Alliance Safety. This handles all safety and permissions related to an event."

What has been your favourite event to date and why?

"U2 is definitely up there with one of the best. This is the largest event we have done to date. We had 100 000 people attend the Johannesburg show, and 75 000 people in Cape Town. When we did this show, it was the first time we had worked in the new stadiums, and therefore had many challenges, which made it a lot of fun.

Other events that we enjoyed tremendously were the Coke Fest events. It is always fun to do outdoor festival style events with fantastic artists."

How did you get into the industry?

"We studied at the Granger Bay Hotel School, and whilst we were studying, started out as drivers or runners for Mushroom Productions on all of their events. We would drive artists around, set up dressing rooms, pack fridges, and just do all sorts of odd jobs on the event sites. Once we finished studying, Mushroom Productions offered us the opportunity to become partners in the company, and opened up a Mushroom Productions branch in Cape Town. And the rest, as they say, is history."

What do you find to be your biggest challenges on events?

"Usually it is the international artists and their strange requests. For example, we've had to sit and take all the red M&M's out of 40 large packets, so that the artist only had a bowl of red M&M's.

We have had to hire someone in the UK to fly a specific 3D screen over night as the one we had in the country was the only one available and had gotten a tear in it. The guy flew over night with the screen, dropped it at our venue just in time to get it up for the event, and flew straight back to the UK again.

We have also had to bring in three cheetahs to a venue to be on display for an artist to look at outside his dressing room."

What about your job gets you up in the morning and rearing to go?

"The fact that every day brings something new. There are so many facets to the job, including budgeting, client meetings, doing proposals and presentations, being on site, on shows and so forth. You never really know what each day will be like, and therefore you are always excited – it keeps you on your toes. One minute you are in the office, and the next you are on a flight to Dubai, or Nigeria or perhaps Johannesburg. You just never know."

How would you describe your average day as an event manager?

"Wow, if only there was something like an average day for us. Some days are filled with catching up on paperwork, while others are spent running from one meeting or site visit to the next. When we have an event on, we spend most days on site overseeing the build of the event."

What tips do you have for those looking to enter the industry?

"Be willing to work crazy hours, be willing to do crazy things for your clients, and be willing to work with crazy people. Most importantly, make sure you always have fun."

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5. Conclusion

By employing relevant planning and coordination tools and project management techniques, and keeping up to date with software developments that can streamline planning and project management processes, event managers can ensure that their events run as smoothly as possible, leaving both the attendees and organisers with a deep sense of satisfaction and joy that comes from being part of an unforgettable event.

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