Event Management Reporting Tool

Project Scope Document

1. Executive Summary

This document outlines the scope for developing a subscription-based Event Management Reporting Tool specifically designed for the events industry. The application will streamline financial tracking, budgeting, and reporting for event organizers, providing appropriate transparency to partners, sponsors, and suppliers while maintaining necessary confidentiality. Based on our analysis of your requirements and industry examples, we propose a solution that will transform manual spreadsheet processes into an integrated, collaborative platform.

2. Business Context

Currently, event organizers in the industry (including those managing major events like Ultra and Corona Festival) rely heavily on Google Sheets for financial planning and reporting. This manual approach creates several challenges:

- Time-consuming year-over-year comparisons
- Difficult collaboration between stakeholders
- Limited visibility for sponsors into their ROI
- Challenges in tracking payments and supplier management
- Manual reconciliation of planned budgets versus actual expenses

Our proposed solution addresses these pain points while creating a potential new revenue stream through a subscription model.

3. Project Goals & Objectives

Primary Goal

To develop a comprehensive event management reporting tool that simplifies financial processes for event organisers while providing appropriate financial visibility to all stakeholders.

Key Objectives

1. Reduce manual reporting workload by 75%
2. Standardize financial reporting across all event types

3. Improve transparency for sponsors while protecting sensitive supplier information
4. Streamline quote and invoice management processes
5. Enable data-driven decision making through historical comparisons
6. Create a scalable platform that could be marketed to major industry players

4. Scope of Work

Core Functionality

1. **Event Creation and Management**
   1.1. Event profile creation (date, location, time, etc.)
   1.2. Stakeholder invitation system with customised access levels
   1.3. Template functionality using prior event data
2. **Role-Based Access System**
   2.1. Customisable permission levels for different stakeholders
   2.2. Selective visibility of supplier details
   2.3. Tiered access for financial information
3. **Budget Management**
   3.1. Detailed budget creation with industry-standard categories
   3.2. Budget vs. actual expense tracking
   3.3. Historical comparison functionality
   3.4. Support for all expense categories. As per examples:
      3.4.1. Talent
      3.4.2. Stage Production
      3.4.3. Facility Infrastructure
      3.4.4. Administrative
      3.4.5. Bar & Food
      3.4.6. Marketing & Content
      3.4.7. Special Items
      3.4.8. Etc
4. **Supplier Management**
   4.1. Quote and invoice upload system
   4.2. Approval/rejection workflow/system
      4.2.1. Optimisation here for filtering
      4.2.2. Total cost threshold
      4.2.3. T&Cs
   4.3. Payment tracking
   4.4. Document storage
5. **Revenue Tracking**
   5.1. Howler integration for ticket sales data
   5.2. Multiple revenue stream tracking
   5.3. Sponsorship management with payment schedules
6. **Financial Reporting**
   6.1. Detailed budget/expense summaries

      6.2. VAT calculations

      6.3. Profit and loss statements

      6.4. Partner distribution calculators

      6.5. Customisable reporting for stakeholders

7. **Payment Tracking**

      7.1. Partner payment allocation

      7.2. Payment scheduling and monitoring

      7.3. Outstanding balance tracking

8. **Document Repository**

      8.1. Centralized storage for all event documentation

      8.2. Historical data access

      8.3. Document version control

5. Deliverables (High-level)

1. **Web Application**
   - Responsive design for desktop and mobile access
   - User-friendly interface with role-specific dashboards
   - Secure login and authentication system
2. **Data Management System**
   - Secure database structure for financial and event information
   - Data import/export functionality
   - Backup and recovery protocols
3. **Integration Framework**
   - API for Howler integration
   - Potential expansion points for future third-party connections
4. **Documentation & Training**
   - System documentation for administrators
   - Training materials and support resources

6. Success Criteria

1. System successfully replaces Google Sheets for all financial planning and reporting
2. All stakeholders can access appropriate information based on their role
3. Event organizers can create comprehensive financial comparisons between events
4. Suppliers can efficiently submit and track quotes and invoices
5. Sponsors receive clear visibility into their sponsorship ROI
6. Partners can review and approve budgets through the platform
7. The system accommodates events of various sizes, from beach parties to major festivals

Side Notes:

- ❖ Handling event cancellations
- ❖ POPI DATA