



iSPARK EVENT PLANNING SURVIVAL GUIDE

VOLUME 2

The Post-Event Debrief | Venue Site Inspections



ABOUT THE AUTHOR

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Krista is known for her efficient and organized work style, and her attention to detail along with her ability to effectively deliver on commitments, realize objectives and complete projects on time and within budget. She is dedicated to her clients and provides creative solutions tailored to each client's specific needs. Krista brings a tremendous amount of energy and out of the box thinking to every project. Her personal manifesto is *"There is never a crowd on the extra mile"*.

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Introduction

Welcome to the wonderful world of event planning! Volume 1 of our Survival Guide featured tips and tricks for stickhandling three important areas of event planning:

- Wayfinding
- Name Badges
- Event Crises

In Volume II, we delve into:

- The Post-Event Debrief
- Venue Site Inspections

The Post-Event Debrief

Every event planner knows how important it is to plan every microscopic detail in the pre-event stage; however, many shy away from digging deep into what worked and what didn't during a post-event debrief.

Event planners tend to be more focused on diving into the execution of the logistics of the event – more familiar (and comfortable) territory.

It is tempting to avoid the post-event debrief, especially when the event is determined an all-around success. However, if you want to replicate success, grow from challenges, and innovate for future events, you need to do a thorough post-event debrief.

WHY IS THE POST-MORTEM SO HARD?

The post-mortem is hard. But, it will be much easier and more productive if you have a framework to work from.

Take the time to go through this exercise and you will not only get better at it, but you will improve on your skills as an event management professional. You will also establish yourself as a trusted advisor – someone who sees the big picture and is willing to work to make every event successful in the long-term.

So, yes, the post-mortem can be frustrating and time consuming. And yes, we can talk ourselves into thinking it's not necessary because we already know what we need to improve upon. We can tell ourselves what's done is done and it's time to move onto the next thing. But, all of these objections are more psychological than practical.

So, get over it. You're doing the post-event debrief and here are our suggestions and guidelines to help you through it.

Defining Success Upfront

Each person involved in the planning and staging of the event may have a different version of success. So, it is very important to establish some common goals upfront. Here are some questions to ask yourself and your team:

- Why is the event taking place? What is the event's purpose?
- Who will the event serve? Who is the target audience? Who are the stakeholders?
- How will success be measured? What does success look like? What is the feasibility of success?
- How are the brand goals aligned to the event?
- What action do you want your audience to take before, during and after the event?
- What is the budget or budget range? Is there is a financial objective?

FRONT OF HOUSE (FOH) VS. BACK OF HOUSE (BOH)

You may be familiar with this terminology from the restaurant biz where 'back of house' is a term referring to the kitchen area and staff who work in the kitchen. The 'front of the house' refers to the dining room of the restaurant and staff who directly interact with customers (hostess, server, etc.).

In the events world, we have our own version of FOH and BOH.

Event planners tend to overanalyze and obsess over hiccups that happen behind the scenes both in the lead-up to an event and during an event. This is back-of-house. Typically, most of the problems that actually occur BOH stay BOH. In other words, only the event planning team is aware and affected by it and the stress or the scramble is not apparent to event attendees.

For example, the dinner guests were not aware that you were planning to serve custom-made cupcakes with the event logo on them for dessert. They were also not aware that the bakery mixed up the delivery date and failed to deliver them on the day of the event. They also were not aware or affected by your implementation of plan b (thankfully the in-house caterer was able to whip up some fancy butter tarts as a replacement dessert just in time for dinner). In this example, the mistake is disappointing, but it is 100% BOH and has no impact on event attendees.



A FOH issue refers to situations that the attendees are aware of and experiencing. For example, if the air conditioning breaks down in the venue and everyone is uncomfortably hot and you, the event planner, are unsuccessful in getting it fixed. This is a FOH problem and one that the event hosts and the venue are surely going to be hearing about live (during the event) and again in your post-event survey or feedback.

So, when going through your post-event debrief process, make sure to delineate

whether a problem mostly affected FOH (your guests and attendees) or BOH (your suppliers or event planning team). During your debrief, don't forget to discuss your trouble-shooting tactics and the solutions you considered and your overall technique for dealing with the problem. Congratulate yourselves for a problem that was successfully managed and don't beat yourself up about something that went south. The point of the post-event debrief is not to dwell on mistakes. The objective is to learn from them and take those learnings forward to improve on your next event.

Questions to Ask During Your Post-Event Debrief

As you plan your post-event debrief, consider asking yourself these questions:

- Were your outlined objectives achieved? What were the successes and challenges in achieving them?
- What went well? What didn't go well? Were these things in your control or out of your control?
- Did the event serve stakeholders as intended?
- Were your pre-determined measurements of success achieved?
- Did the brand goals remain aligned to the event?
- Did the audience take the intended action? Why or why not?
- Was the budget or budget range met? Was the financial target achieved? Was the budget adequate/realistic? Were there any unforeseen costs that could be planned for in the future?
- Which aspects of the planning process were successful? Which aspects were challenging? What adjustments do you need to make going forward?
- Where could you be more efficient?
- Do you have the right staffing model in place to ensure success of the event? Are there any gaps or capacity issues?



You don't need to wait until the end of the event to consider these things. The answers to some of these questions can actually be gathered and tracked throughout the planning lifecycle of the event. If something comes up along the way, take notes as you go along so that you don't forget. Capturing feedback throughout the event process is less daunting than waiting until the event is over and you are struggling to remember some key points that happened earlier on.

MINI DAILY DEBRIEFS

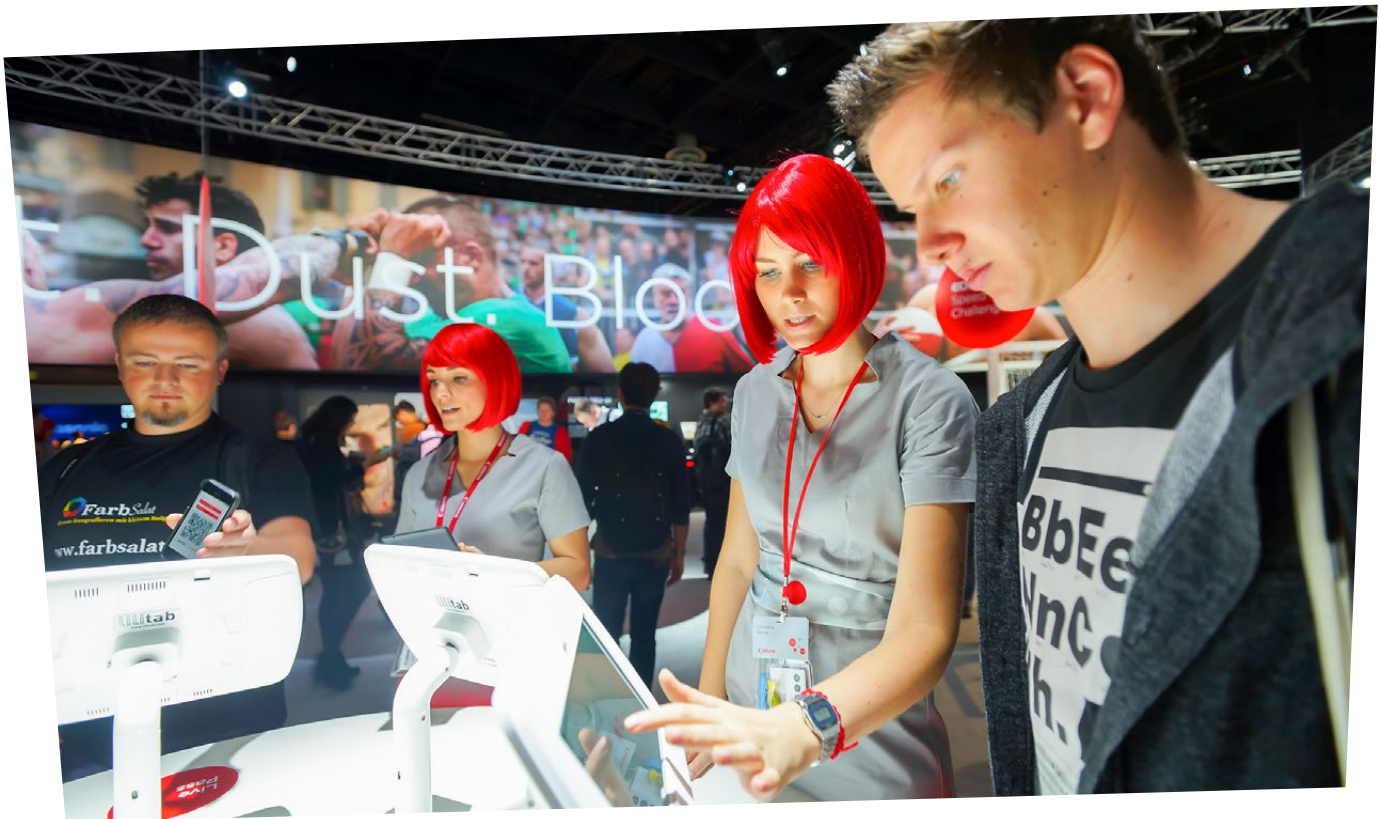
During multi-day events, mini daily debriefs are important. They allow you to make in-the-moment adjustments. They also give you an opportunity to capture the successes and challenges you are experiencing **live**. Plus, they have the added benefit of bringing your team

together on a daily basis and even sharing a few laughs about some of the ups and downs of the day!

SURVEYING THE ATTENDEES

The most important people you need to hear from with feedback on your event are the attendees! You can ask for feedback during the event and immediately afterward and it can take the form of:

- live focus groups during or after the event
- onsite surveys
- follow-up calls (this is a great technique with sponsors)
- app integrated surveys
- post-event email surveys
- social listening and anecdotal feedback



CONCLUSION

The post-event debrief is much less scary if you have a plan of attack. None of our suggestions are hard or time consuming... and they will offer GREAT results.

You have all the knowledge from the event that just took place fresh in your mind – what worked and what didn't work, feedback from your stakeholders on their experience, and how it can be improved. This is the framework to build upon for the future.

If you're still not sure you want to delve into a post-mortem debrief and really need one more rationale of why the post-event debrief is important, think of it like this:

*The dreaded post-mortem is the **first** planning session of the **next** version of the same event!*

What are you waiting for? Start debriefing!

Venue Site Inspections | The Perks, The Pitfalls & The Pointers

Working with venues can be a really fun part of planning an event. Throughout the years, we have had the chance to visit (and go behind the scenes) at some really cool venues!

However, choosing a venue for your event can also be an extremely stressful part of the event planning process. It's very important to find the venue that is the right fit for your event.

So, we've compiled a checklist to help you navigate the process of finding the perfect

venue and to assist you in asking the right questions **before** you sign the contract (to ensure that there are no hidden costs or unexpected surprises later on).

Our checklist focuses primarily on hotels, which are only one type of potential venues that you may be seeking out for your event. However, many of these same principles apply to other venues, including convention or conference centres, restaurants & bars, museums, sports complexes, golf courses, etc.



Our Checklist

GETTING STARTED

Before you ever hop on a plane or jump in the car for a site visit, you'll want to have a document that outlines some of the things you are looking for in a venue. Most event planners create a spec sheet or RFP (Request for Proposal) which outlines the type of venue they are looking for and the specific requirements for the upcoming event. The more detailed the document the better as it helps the potential venues self-assess whether or not they are a good fit for your event. It also helps the planner to compare one venue against another (apples to apples).

***Tip:** If you have some very tight budget parameters for your event, it is best to state this clearly upfront in the RFP. It will save both parties from wasting time if it turns out that budget is a deal-breaker.*

Event planners may also consider working with site selection firms. This is a whole other topic that is not covered in this Volume! For the purposes of our checklist, let's assume YOU – the event planner – are tackling this daunting task of finding the perfect venue and taking responsibility for asking all the right questions in the site visit.

IN-PERSON VS. VIRTUAL SITE INSPECTIONS

Because of cost (or time), it may not be possible to visit every destination (city/country) or site (property/venue) under consideration before making a decision and moving to the contract phase. Physical site inspections are always the preferred approach. There is no substitute for seeing the space live.

There have been many times where we discovered some unattractive elements onsite that were not obvious during the RFP and bidding process. For example, airwalls that offer no sound barrier, room service trays left sitting in the hallway overnight, accessibility issues, pillars and ceiling heights in meeting rooms, etc.

A physical site visit also gives you (the meeting planner) and the client or your supervisor (if you bring them along), a chance to meet the

people working at the venue and to get a feel for what the working relationship would be like. However, there are times when you may need to book a venue "sight unseen" relying on photos, floor plans and online virtual tours of the space. If you absolutely cannot visit the space, you may want to reach out to your network of fellow event planners asking if anyone has seen the venue or booked it before. We suggest that you ask the venue for a recent client group who could serve as a reference.

Tip: If you cannot personally see the space, make sure that your RFP or bid documents (and all the back and forth communication in between) covers everything thoroughly so that you have something in writing to fall back on (in addition to your contract with the venue).

Plan the Visit – Who's Coming?

Who is a critical part of the site visit? At iSPARK, we have an AV consultant as part of the team and he comes along for the ride at site visits. AV is usually a BIG element in our events and one that we don't want to leave to chance.

We cannot tell you how many times our AV consultant has identified possible issues that would otherwise have caused the team many sleepless nights in the planning phases of the event (not to mention the additional costs to the client).

Here are some event technology items to be checked off your list during the site visit:

- Rigging points
- In-house sound system
- WiFi capabilities
- Power supply



***Hint:** In your RFP you should be asking about options for using the in-house AV company for equipment and technology needs OR about use of a third party external provider. Best to have a choice in the matter!*

You may also want to bring along your client, your boss, or another key member of your planning team to have a second set of eyes.

Planners should also ask the venue to include their onsite AV manager (if applicable) and one of their event managers (or Director of Convention Services) as part of their team during the site visit. Typically it is the sales people that conduct the site visits and, unfortunately, they don't always convey the most accurate information about how logistical elements of your event may end up being executed.

***Tip:** You need to make the most of this site inspection – don't be afraid to ask for other venue staff members to participate (i.e. In a hotel, it may be the director of loss prevention security, front office manager, director of housekeeping, the chef and catering manager, the hotel general manager, etc.)*

Have a list of your priorities in hand and make sure you sufficiently cover each one off during the visit. Consider the amount of time this will take and plan accordingly. The more people who join the site visit, the longer it takes, so weigh the pros and cons of adding additional people to the inspection. Give yourself enough time to be thorough and comprehensive. You don't want to feel rushed.

If you are booking guest rooms along with event space, make sure you see the various room types and confirm that the space you are considering using will be available for you to see when you are there (i.e. not in use by another group). Sticking your head in a meeting room for a quick peek when the room is in use may not provide you with all the info you need.

Translating Venue-Speak

From time to time, planners may find themselves in situations where they neglect to ask comprehensive questions during the site visit resulting in miscommunications or a lack of understanding about various venue services or policies that could dramatically affect the event.

Here are some common questions that may come up during a site inspection, and here is the typical response (and what it really means in practical terms for event planners):

Q. from event planner:

Do you have an in-house supplier for A, B, C or D?

A. from venue staff:

Yes, we have a list of preferred suppliers for those services.

What this really means: You may be forced to pay a premium price to use a supplier that is not on their list OR the venue may be receiving a cut from supplier contracts (which is built into the pricing) making their preferred supplier more expensive.

***Tip:** If you have a vendor you trust and want to work with, make sure to stipulate this in the RFP and mention it during the site visit and then write it into the contract. AV is the most common one... Don't be handcuffed into using the in-house provider if a third party supplier makes more sense for you.*



Q. from event planner:

How is the WiFi?

A. from venue staff:

It can be a bit glitchy in certain places throughout the venue.

What this really means: You cannot count on the WiFi. Be sure to check the WiFi during the site visit, attempt to connect, try downloading large files, etc. Don't be afraid to ask questions about bandwidth, how many devices can realistically be connected to the WiFi at the same time, etc.

***Note:** If you are checking WiFi, you should also check cell signals. In some buildings (especially those with a lot of concrete), cell service can be unreliable or even non-existent.*

Q. from event planner:

How do you manage special requests?

A. from venue staff:

We are happy to accommodate any special requests you may have.

What this really means: Yes, BUT, we may charge you for it.

***Tip:** Ask about hidden fees. One situation that is fairly common in hotels is room re-set charges. When an event planner wants to change the seating in a meeting room from one day to the next (i.e. switch from rounds to theatre-style), some venues may gladly accommodate this change, but they may also charge you for it (hotels are notorious for this).*

Q. from event planner:

Are there any updates or renovations to the space that could affect our event?

A. from venue staff:

We do have some upcoming construction scheduled, but it will be completed before your event takes place. It won't affect your event.



What this really means:

Yes, it could possibly affect your event (because construction and renos rarely ever finish on time). Ask lots of questions and consider writing in an 'out' clause into the venue contract which allows you to back away from the booking if it appears the construction may impact you.

Q. from event planner:

If we book this specific room for our event, is there any chance we wouldn't get this room for our event?

A. from venue staff:

We reserve the right to move your event to

a comparable space if the size of your event changes from your agreed upon numbers.

What this really means: You could end up with a less desirable space because of a double booking, the venue is prioritizing a more lucrative contract, or for renovations or construction (i.e. carpet is being upgraded). If you sense you may end up with the raw end of the deal, don't be afraid to ask for this inconvenience to be reflected on the final bill (or for compensation vis-à-vis perks or concessions). However, on the plus side, sometimes you end up with a superior space!

Q. from event planner:

We are going to need some additional services or items (coloured linens, shuttle service, soft furniture, a wheelchair ramp). Do you offer any of these things on a complimentary basis?

A. from venue staff:

We can offer X,Y,Z at no charge.

What this really means: These complimentary offerings may not have been mentioned if you had not asked. Or, perhaps there would be a charge for it later on because it was not discussed as complimentary for your group. So, if this is an important item, ask very specific questions about ancillary services/products that you may need and make sure to have it written into the contract.

Note: Another potential pitfall could be that the ancillary service has limitations (i.e. an airport shuttle that runs on a specific schedule that doesn't line-up nicely with your event or the venue has one wheelchair ramp in inventory, but you actually need two). Clarify all of these small details in advance.

Q. from event planner:

We would love to have early access to the space for set-up purposes? Is this a problem?

A. from venue staff:

Early access shouldn't be a problem!

What this really means: It's possible, but there may be a charge for it. Let's face it, the venue will be seeking every possible opportunity to rent the space and generate revenue, so if another client wants to book the space the night before your event, the venue will rent it to them (which means your access will only be as stated in the contract).

Tip: If early access is important to you, book your space the day/night before for set-up as part of the contract. At the same time, ask about the loading dock. Where is it and are there specific hours of operation for access? Are there any charges for use of the loading dock and does the venue charge a fee for handling your event materials? If you have an extensive set-up and use of the loading dock is critical, make sure you coordinate this along with access to your event spaces.

Q. from event planner:

What type of technology do you have in-house?

A. from venue staff:

We have all the latest and greatest event technology!

What this really means: The venue sales person may not be overly familiar with exactly how the technology works or what it does.

Tip: Ensure the venue staff who are responsible for the in-house (built-in)



technology are answering any questions you may have about this. They can explain exactly what it does and doesn't do.

Q. from event planner:

Do you have a lot of breakout rooms?

A. from event staff:

Yes, we have plenty of breakout meeting space.

What this really means: The breakout space may be far away from your core space, on a different floor, in a different tower, or not fully accessible, which could result in lost time as guests transition from one space to another. It could also mean additional costs in your event budget for wayfinding signage. Make sure to see all the space and verify the travel routes (between the meetings spaces and between guest rooms and meeting spaces)

Hint: Check out Volume I of our eBook for some great suggestions on unique and cost-effective wayfinding signage.



Q. from event planner:

Do you have a sample of your catering (banquet) menus?

A. from venue staff:

Yes, here is the current menu and pricing.

What this really means: This is the current pricing and offerings, but this could change in three months, six months or in a year (this is particularly relevant if you are booking an event space far in advance).

OR

It could also mean that the venue does offer custom menus, but it's more work and potentially brings in less revenue for the venue so it isn't something that is readily offered. Not all venues are open to customize f&b.

Tip: You can ask to have it written into your contract that you will be basing your f&b choices on a specific menu or that you will require customized menus within a certain price range.

Q. from event planner:

Are there any other events scheduled to take place at the same time as our event?

A. from venue staff:

Yes, but it won't affect your event.

What this really means: The other group may put additional stress on services in the venue (in a hotel, for example, the elevators to and from guest rooms and convention floors may be running at peak capacity if two large groups are in-house at the same time). It could also mean that the other group is overlapping with some of your space and event attendees from both events may be interacting or mingling inadvertently.

Q. from event planner:

Who will be our main contact at the venue?

A. from venue staff:

It will be Mr. or Mrs. So-and-So.

What this really means: Mr. or Mrs. So-and-So will not be eating and sleeping at the venue over a 24-hr period during the event. So, there are other key venue personnel you will need to meet beforehand (and ensure that all the relevant event info has been passed on).

Q. from event planner:

We host this event every year so is there any chance that the venue will be available next year too?

A. from venue staff:

Sure! Just let us know your dates when you are ready.

What this really means: We are not holding any dates or space for you, so if you want to secure the space we will need to sign a multi-year contract now.

Hint: Negotiating a 2-year deal could be very lucrative and allow you to lock in pricing. But, don't rely on a verbal discussion about a multi-year deal.

NOW YOU KNOW MORE ABOUT “VENUE SPEAK”!

In summary, during the site inspection:

- Ask the right questions.
- Probe for clarification.
- Learn how to read between the lines.
- Don't rely on verbal agreements – write it into the contract.

“SURPRISE” SITE INSPECTIONS

Some planners believe a more realistic experience is achieved if they just show up (unannounced) for a site inspection. At iSPARK, we will admit to popping in unaccompanied and walking around a hotel unannounced to get a feel for the space and to see what's happening when other groups are in-house. However, generally it is not recommended to use an impromptu visit as the sole means to conduct the site inspection. In order to do a thorough site inspection you need the venue representative to give you the full tour and answer your questions.

GETTING TO KNOW THE EVENT

Sometimes it helps to kick-start the site visit with an overview of the event – who attends, where has the event been held in the past, what elements are important to the event host, etc. etc. You may also send this info in an email to the venue prior to arrival or include it in your bid documents or RFP. An overview like this sets the stage for explaining how you are evaluating the venue and what some of the deal breakers may be.

Hint: Pay attention to how this information is received – venues who embrace this and make an effort to understand and cater to your audience will make better planning partners.

COMPILING & TRACKING INFO FOR EACH VENUE

If you are touring more than one venue for a particular event, you may find that the amenities and pros and cons of each one start to blur together. It helps to take some video or photos at each spot (and not rely on stock photos that the venue may send to you). If you shoot some video you can also record your personal comments or observations about the space as reminders later on.

Checklists are your best friend during site inspections. If you are using an RFP process or bid documents you may have already requested and received detailed information about each prospective venue that you are considering. However, it doesn't hurt to have a checklist on hand during the walk-through to double-check that you have reviewed and covered off each and every item that is important to you.

For example, if wheelchair accessible guest rooms are a requirement for your event, the hotel may have responded to the RFP indicating that they have a certain number of wheelchair accessible rooms in inventory. However, there are some nuances related to accessible rooms that you will want to double-check, such as roll-in showers. Sometimes hotels may define a room as wheelchair accessible because it has wider doorways, but if the shower doesn't allow the guest to roll in and out in his or her chair, it may not meet your specific standard of wheelchair accessible. The same goes for bed height. Beds are higher these days, making transfers from a wheelchair to the bed problematic for wheelchair users who usually prefer low beds. So, you'll want to check this out during the site inspection.

If you are really a keener, you can create a database with the specifics for each venue you visit and update it from one year to the next adding or removing venues as you go. This may save you time down the road, but don't rely on this info over the long-term as venue amenities (especially at hotels) are constantly changing.

WORKING WITH THE DMO

If you're looking at multiple hotels or hotels plus a convention center or other venue, ask the DMO (Destination Marketing Organization) or Convention and Visitors Bureau (CVB) for assistance in finding the perfect spot for your event. They can help you schedule visits and narrow down your options. They also may have some hosting grant money available or can offer some valuable in-kind services.

When it comes to selecting a host city for your event, things can get very competitive! Cities may be willing to battle it out to win your event because there is money (and reputation) on the line.

Ask yourself – do you want an event **partner** or an event **supplier**? If you are seeking an event partner, working with the DMO can be a fantastic way to ensure a memorable experience for event attendees and, at the same time, positively impact your budget.

PAYING FOR SITE INSPECTIONS

There are costs involved in a site visit: transportation, parking, meals, overnight stays, etc. If you are working with the DMO (see above), they may offer to off-set these costs to encourage you to come to their city and experience what they have to offer. This is a chance for the DMO to show -off what they can do and set themselves apart from the competition.

FAM tours are another way to conduct a site visit without incurring the costs. However, some event planners abuse this privilege and go to destinations and venues that they know they will never use just to experience all the perks!

To ensure there are no real or perceived obligations or bias, you could pay for your own trip upfront and if you contract and hold a meeting, you could consider negotiating that amount being deducted from the final bill or ask for a reimbursement at that time.

The Perks | VIP vs the 'Regular Joe'

Speaking of the perks... site inspections can be lots of fun, particularly when the host hotel or the DMO are intent on wooing you. In-room amenities, limo service, fancy meals, tickets to shows and sport events and gifts may all be part of the plan to help sway you into selecting a specific venue or location. It is tempting to get caught up in the superstar treatment, but it is important to be objective and stick to your list of requirements so that you can evaluate the venue based on those elements only.

The exception would be if your meeting participants include a number of dignitaries requiring celebrity-like service – then it may make sense to sample a hotel's VIP program to make sure it will meet your participants' needs. However, generally, you are there to experience what the majority of your event participants will experience (which likely doesn't include the chocolate covered strawberries and complimentary massage).



THE FOOD!

Some event planners like to conduct “tastings” during the site visit to make sure the food served will meet the group’s expectations. If it’s a small group with particular food and beverage requirements, a tasting may make sense. But, for a larger group or conference, the small meal prepared for your tasting event will not be indicative of what is ultimately served on the buffet for your group of 300.

If you happen to conduct your site visit when another large group is in-house and a meal is being served, it may make sense to take a peek at the food presentation or ask for a sample. You should also take note of the number of banquet staff on hand to service the attendees and how quickly and efficiently the food gets out and tables are cleared.

For special events, you may want to meet with the chef during the site visit to learn about the hotel’s capabilities, their degree of creativity, and the chef’s preferences. If you anticipate lots of people in your group with special meal requirements (i.e. food allergies or meals designed for high performance athletes), meeting with the chef to discuss how they will customize menus for your group is essential.

If budget is a major consideration, make sure you find out if the hotel is willing to put together customized menus to fit within your budget or adapt existing offerings.

**See our suggestions on page 16 for more on how to work together with the venue on food and beverage at the site visit stage to avoid any issues later on.*



Tips on Viewing Guest Rooms During the Site Visit

- See as many of the different guest room types as possible and be willing to take a look at the worst room in the place (i.e. the one by the elevator or ice machine or not renovated or without a window or with a view of the loading dock or with a poorly soundproofed connecting door).
- If your group is planning to use suites, ask to see different types of suites during the site visit - those with separate parlors and entrances, one room "executive" suites, suites with Murphy beds, suites suitable for small meetings or entertaining, etc.
- Smoking or non-smoking? Many hotels are fully designated as non-smoking, but some groups have smokers and may need to consider this. You may need to see where smoking rooms are located within the hotel and note whether or not one specific floor is designated for smokers.
- If you can, incorporate an overnight stay during the site inspection because there is nothing like experiencing a guest room yourself. Check for soundproofing, security and general comfort.

CONCLUSION

Site visits are exhausting, time consuming and sometimes very overwhelming. However, they are critical in fully evaluating a venue to determine if it is the right one for your event. There is no better feeling than finding a fantastic venue and a collaborative host partner committed to helping you deliver an outstanding and memorable experience for your guests!

PS – If you need help with site visits, reach out to us! We have conducted hundreds of site visits through the years and can help guide you through it to find the perfect venue. We'll even loan you our AV Consultant!

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