

PROJECT CONNECTIONS / PLANNING KIT 09

Start With the Outcome. Plan the Experience.

Corporate Event Purpose & Delivery Planner

Build a corporate event around a measurable purpose, usable attendee experience and accountable delivery roles.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative supplied photo; not member project evidence.

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Define the business purpose

Specify the intended audience and the change the event should support. A clear objective helps decide format and spend before deposits.

YOUR STAGE / Define / Design / Confirm / Deliver and evaluate

Purpose / intended audience / accountable event lead

Measurable target / deadline / evaluation method

Spending boundary / decision authority / review cadence

USE THIS WORKBOOK

Gather facts and requirements / pages 3-6

Compare and coordinate / pages 7-10

Review readiness and act / pages 11-14

Use actual results for evaluation. Do not assume guaranteed attendance, inquiries or revenue.

Understand participation needs

Gather relevant audience input before selecting a venue or platform. Confirm accessibility communication needs and applicable duties with responsible parties. [S1]

Audience / evidence of needs / information still missing

In-person, remote or hybrid participation / reason

Access and communication questions / responsible contact

How feedback changes format / decision owner / due date

Ask for practical arrangements, not diagnoses. Do not treat a venue's general accessibility claim as confirmation of every event need.

Compare venue and format choices

Use verified capacity, actual layout, access, services and terms. Compare the whole attendee experience, including remote participation if relevant.

Option / provider A: _____ B: _____

Comparison point	A / evidence / date	B / evidence / date
Audience fit / verified usable capacity		
Access / communication / facilities		
Included services / technical limits		
Terms / restrictions / timing		
Contingency / alternative format		

Tradeoff / information needed / decision owner / review date

Ask who is responsible for required permissions and applicable safety or accessibility decisions. No generic venue checklist certifies compliance.

Plan event costs and cash timing

Record firm commitments separately from hoped-for registrations or sponsorships. Use quote references and actual due dates.

Period / scenario: _____ Currency: _____

Cost / responsibility	Estimate	Confirmed	Source / cash due
Venue / facilities / service			
Content / speakers / production			
Registration / payment / communications			
Food / access / attendee support			
Setup / cleanup / other providers			
Contingency / other approved expense			

Total / one-time vs. recurring / decision owner / next review

Total committed and estimated costs separately. Match payments to available cash and documented funding; speculative sponsorship is not confirmed funding.

Assign responsibility and authority

For each role, identify who does the work, who can approve a decision and who must receive the result. One person may hold more than one role if capacity allows.

Role / workstream	Does / approves	Receives / due / backup
Organizer / venue authority		
Content / speakers		
Technical production / registration		
Suppliers / attendee communications		
Safety / access coordination		

Unassigned decision / escalation owner / resolution date

Make authority explicit for spending, program changes and stop decisions. A marketing provider is not automatically the event producer.

Build the program around purpose

Each session should serve an audience need and have a prepared owner. Confirm speaker permission, materials, claims and timing before promotion.

RECORD 01

Session / purpose / audience takeaway / proposed timing

Speaker or owner / preparation due / permissions and approved claims

Technical or access needs / dependency / confirmation

RECORD 02

Session / purpose / audience takeaway / proposed timing

Speaker or owner / preparation due / permissions and approved claims

Technical or access needs / dependency / confirmation

No invented speakers, sponsors, testimonials or endorsements. Retain approvals for actual names, logos and content.

Design the registration workflow

Map the minimum information needed and its path. Confirm actual payment terms, privacy decisions and accessible participation arrangements. [S1, S2]

01 / Registration data / purpose / access / retention decision

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

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02 / Payment terms / authorized synthetic-data test / reconciliation

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

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03 / Confirmation / assistance requests / changes / escalation

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

Do not record credentials or payment-card data. An authorized test does not establish legal compliance or replace provider review.

Publish only confirmed attendee information

Tie promotion to actual capacity and approved program facts. Separate invitation, registration confirmation and practical event instructions.

RECORD 01

Message / audience / channel / planned date

Confirmed facts / permission reference / approver

Capacity or program-change trigger / update owner / next review

RECORD 02

Message / audience / channel / planned date

Confirmed facts / permission reference / approver

Capacity or program-change trigger / update owner / next review

Do not invent sponsor commitments or treat every registrant as consenting to unrelated marketing. Confirm applicable permission requirements.

Confirm media and technical production

Ask the provider about actual event capability and the venue about interfaces, limits and access. Business video experience alone does not establish live-event production scope.

Required audio, visuals, capture or streaming / purpose

Technical requirements / venue interface / rehearsal date

Deliverables / consent and rights / approved use / agreement

Failure scenario / fallback / responsible decision-maker

Confirm who operates equipment and who resolves technical issues. Keep technical setup with qualified personnel.

Coordinate the physical handoffs

Confirm which responsibilities belong to the organizer and which belong to the venue or contracted providers. [S3]

Venue / operations lead

Confirm setup access, responsible safety authority, restrictions and fallback arrangements.

Owner: _____ Due: _____ Received by: _____

Catering / suppliers

Confirm delivery, service, handling responsibilities and required venue approvals.

Owner: _____ Due: _____ Received by: _____

Access / attendee support lead

Confirm approved arrangements and the escalation path for unmet needs.

Owner: _____ Due: _____ Received by: _____

Setup / cleanup provider

Confirm scope and timing; use commercial cleaning only where verified and contracted.

Owner: _____ Due: _____ Received by: _____

Do not assume a cleaning provider handles hazardous materials or that the organizer may override venue-authority instructions.

Create the run-of-show and escalation log

Assign an owner to each transition and state who decides if the plan changes. Keep trusted contact details in a controlled event contact sheet.

RECORD 01

Time / activity / accountable owner

Dependency / readiness evidence / contact channel

Escalation / venue-authority instruction / fallback decision

RECORD 02

Time / activity / accountable owner

Dependency / readiness evidence / contact channel

Escalation / venue-authority instruction / fallback decision

If immediate danger arises, contact emergency services and follow venue/authority instructions. This planning tool is not emergency-response certification.

Conversations and accountable next steps

Close the loop with actual results and agreed follow-up. Record the evaluation date and the source for each measure.

Event lead: How did actual attendance and audience feedback compare with the stated target?

Providers / follow-up owner: What remains due, what should change, and which inquiries permit further contact?

Role / meeting date / question / documents to bring

Recommendation / next action / owner / deadline / follow-up

Decision / limits: _____ Review cadence: _____

PRIORITY 1 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

PRIORITY 2 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

Keep completed records private. Share only what the recipient needs through an agreed secure channel.

Sources and your next connection

Primary resources checked October 15, 2026 (UTC). Recheck before acting. Blue underlined titles are clickable; [S#] references identify the sources below.

[S1] U.S. DOJ: Effective Communication

Accessibility communication duties for covered entities; assess the actual event and organization.

[S2] FTC: Protecting Personal Information

Data inventory, access, retention and security planning for businesses.

[S3] OSHA: Emergency Preparedness and Response

Workplace preparedness and authority-coordination resources; confirm event-specific responsibilities.

General educational planning information, not individualized legal, financial, accessibility or event-safety advice. Requirements vary; qualified professionals and responsible authorities should confirm applicable decisions.

Need professional guidance?

Explore current professionals in the SJBA directory. Bring your questions. Roles in this workbook are conceptual; verify representation, qualifications, scope and availability.

About SJBA

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