

Event Planning Business — Workbook

This workbook turns the course into your launch plan. Each section maps to a course module and moves you from setup to your first profitable, contracted event. Work through the exercises, worksheets, and checklists in order, and use the templates to run real events with professional systems.

Building the Business Foundation

Define your niche and service tier, complete legal and financial setup, and assemble a portfolio so you can take clients and money safely.

Exercise: Write Your Positioning Sentence

Draft a single sentence that states exactly who you serve, then pressure-test it. Aim for a sentence so specific that a stranger could instantly think of someone to refer.

- Complete this sentence: I plan [event type] for [client type] in [location], priced [range].

- Which service tier are you launching with first, and why does it carry the lowest delivery risk for you right now?

- When you say your sentence to three people in your network, can they immediately name someone to refer? Note their reactions.

- What makes you different from the two closest competitors in your chosen niche?

Worksheet: Legal, Insurance, and Money Setup Tracker

Fill in each field as you complete it. Do not sign your first client contract until the entity and insurance fields are done.

Business entity type chosen (e.g., single-member LLC)

State of formation and filing fee paid

Business name registered (legal name and DBA if any)

General liability provider, annual premium, and coverage limit

Professional liability (E&O) provider and limit

Business checking account opened (bank and date)

Separate client-funds account opened (yes/no)

Accounting software selected (QuickBooks, Wave, other)

Payment processor set up (Stripe, Square, HoneyBook)

Percentage of profit reserved for taxes and the account used

Checklist: Launch-Ready Foundation Checklist

- File LLC and obtain EIN before signing any client
- Secure general liability insurance with a certificate-of-insurance process ready
- Open separate business and client-funds accounts
- Build a one-page website with niche, portfolio galleries, and an inquiry form
- Set up a professional email on your own domain
- Plan a styled shoot with photographer, florist, venue, and rentals to fill the portfolio
- Draft a launch-offer message for one discounted first client in exchange for photos and a testimonial
- Define your inquiry-to-booking flow with a 24-hour response standard

Pricing and Sustainable Revenue Models

Choose a pricing model, build profitable packages, and add revenue streams so income is healthy and less seasonal.

Exercise: Find Your Real Effective Hourly Rate

Run the margin math on a realistic event so you price from numbers, not hope. Use the worked example in the course as your guide.

- For a sample event, estimate total client budget and your total hours across the full engagement.
- Calculate your fee under a percentage model (15 percent) and divide by your hours to get your effective hourly rate.
- Compare that to a flat fee you would feel proud to charge. Which model pays you fairly for this event?
- Set your non-negotiable minimum fee and your target effective hourly rate, then explain how you will measure every future event against them.

Worksheet: Three-Tier Package Builder

Design your packages using anchoring: build the middle tier as the one you most want to sell. Fill in every field before publishing prices.

Essential tier name, included services, and price

Signature tier name, included services, and price (your target seller)

Bespoke tier name, included services, and starting price

Five add-ons with individual prices

Retainer percentage due at signing (non-refundable)

Milestone payment timing and amount

Final balance due date (days before event)

Estimated direct costs per event (assistants, software, mileage)

Target gross margin after direct costs

Checklist: Profit-Protection Checklist

- Set a non-negotiable minimum fee that no small event drops below
- Label the deposit a non-refundable retainer in the contract
- Schedule the final balance due 14 to 30 days before the event, never after
- Track effective hourly rate after every event
- Choose one additional revenue stream to launch in the next 90 days
- Decide your vendor-commission disclosure policy and put it in writing
- Review pricing upward once you close more than 70 percent of qualified inquiries

Vendors, Contracts, and Negotiation

Build a vetted vendor bench, protect yourself with strong contracts, and negotiate and steward budgets so events delight without overspending.

Exercise: Map and Vet Your Vendor Bench

Identify the vendor categories you will build first and define how you vet each one before staking your reputation on them.

- List your top three vendor categories to build first and name two candidate vendors in each.
- For one candidate, write how you will confirm insurance, references from other planners, and their backup plan.
- Which local venues do you most want to get onto the preferred-vendor list for, and why?
- How will you reciprocate referrals so vendors send planning clients back to you?

Worksheet: Client Contract Clause Worksheet

Specify your terms for each core clause so your template contract protects you. Have a lawyer review the finished template once.

Scope of services included (precise list)

Scope explicitly excluded (what is NOT included)

Payment schedule: retainer, milestone, final balance

Cancellation and refund terms at each stage

Force majeure events named (pandemic, government order, venue closure)

Postponement rights and how the retainer applies to a new date

Limitation of liability cap (e.g., fees paid)

Vendor-payment policy (client pays vendors directly or planner handles)

E-signature tool used (HoneyBook, Dubsado, DocuSign)

Checklist: Negotiation and Budget Checklist

- Ask every vendor about off-season and weekday pricing
- Negotiate value-adds rather than only a lower headline price
- Get all revised vendor terms in writing before confirming
- Read every vendor contract the client signs and flag risky cancellation terms
- Build the event budget with a 10 to 15 percent contingency line
- Allocate by category benchmark (catering 30 to 40 percent, venue 15 to 25 percent, etc.)
- Track estimate versus actual live and flag overruns immediately
- Reconcile final actuals after the event to improve the next budget

Logistics, Execution, and Growth

Build the timelines that prevent disasters, run event day with a team and a kit, and turn each event into referrals and growth.

Exercise: Reverse-Engineer a Run-of-Show

Practice building a day-of timeline from fixed anchor points. Work backward and add buffer between blocks.

- List your anchor points for a sample event: ceremony start, sunset for photos, and venue hard end time.

- Working backward from a 4 PM ceremony and a midnight venue close, draft the major blocks from load-in to strike.

- Where did you add buffer time, and which block (such as hair and makeup) is most likely to run long?

- Who is responsible for each cue so nothing depends on you being in two places at once?

Worksheet: Day-of Operations Plan

Fill in your operational plan for one upcoming or sample event so the day runs on systems, not adrenaline. Guest count and number of assistants required

Assistant assignments (who covers ceremony vs. reception)

Vendor load-in times and venue access time

Critical-role backup vendor contacts (photographer, caterer, music)

Rain plan or weather contingency

Day-of kit confirmed packed (yes/no)

Run-of-show distributed to vendors and wedding party (date sent)

Strike and venue clear-out time

Checklist: Post-Event Referral and Growth Checklist

- Request a client review within one week of the event
- Make a specific referral ask to the satisfied client
- Send thank-you notes and favorite photos to every vendor
- Follow up to get onto two target venues' preferred-vendor lists
- Update your portfolio and social media with real event work
- Log the event's numbers: inquiry source, fee, hours, effective hourly rate
- Document one process as an SOP for future team members
- Review your quarterly numbers: inquiries, close rate, average fee, hourly rate

Your Action Plan

1. File your LLC, get an EIN, and secure general liability insurance before signing any client
2. Open separate business and client-funds bank accounts and set up a payment processor
3. Write your positioning sentence and build a one-page website with an inquiry form
4. Plan and shoot a styled shoot, or book one discounted launch client, to fill your portfolio
5. Set your pricing model, minimum fee, three package tiers, and non-refundable retainer percentage
6. Build your vendor bench: vet two candidates in each of your top three categories
7. Finalize a client contract template with the six core clauses and have a lawyer review it once
8. Create your master event budget template with a 10 to 15 percent contingency line
9. Build a run-of-show template and assemble your physical day-of emergency kit
10. Launch a post-event referral sequence and document your first SOP so the business can scale

