

3. LEARNING YOUR CLIENT'S NEEDS



Extract

OVERVIEW

In this module, we cover the following topics:

- Getting to know your client
- Planning correctly for the right type of event
- Who, what, when, where, and how?
- Initial client contact form

GETTING TO KNOW YOUR CLIENT

As an event planner, it is your duty to make sure that your client's needs and concerns are taken care of during the event planning process. In order to do this, you must effectively communicate with your client. This means asking a lot of questions and clarifying ideas.

Effective communication decreases the instance of unnecessary errors and mistakes. The purpose of this module is to provide you with tips to help you successfully identify your client's needs.

PLANNING CORRECTLY FOR THE RIGHT TYPE OF EVENT

In order to serve your client you must learn what type of event they want to host and their expectations for the event.

In the beginning, you client may have a vague idea of what they want. But that is why they have come to you. They need help to make their plans become a reality. Therefore, you must keep in mind the following guidelines when meeting with a client to plan an event.

- Who?
- What?
- When?
- Where?

- How?

WHO?

In order to plan the event, you must find out who the target audience is going to be. In order to do this, ask your client the following:

- Who will be attending the event? Find out if it is friends, family, business associates etc.
- How many people do you plan on attending the event?

WHAT?

Your next task will be to find out what type of event you will be planning. Being an event planner means being able to organize for any situation. You may be asked to organize:

- A birthday party
- A wedding
- A concert
- A business Lunch

It is your job to be able to successfully handle whatever you are presented.

WHEN?

Your next task is to find out where your client wants to hold the event. This is very important in order to develop a timeline of services.

Sample questions you should ask your client include:

- What month do you want the event to take place in?
- Is there a certain day the event needs to be held on? Would you prefer a weekday or a weekend date?

- Do you want the event to take place in the morning, afternoon, evening, or night?
- Is it a one-day event or will it take place over a series of days?

You must ask your client these questions in order to pick a suitable date. In many instances, a date may have to be changed. But whatever the case, this information will be needed in order to pick a suitable venue for your event.

WHERE?

Your next task will be to your client where they plan on holding an event. The location of the event will depend on the nature of the event. Consider the following:

- If your client is planning a birthday party or baby shower, they may plan on holding the event at their residence. If it is a large crowd, they may want to host the part at a banquet hall.
- If your client is hosting a wedding, they may want to host it at a church, hotel ballroom, or country club.
- If your client is hosting a business event, they might want to host it at the business or a hotel conference room.
- If your client is hosting a job fair or trade show, they may want to hold the event at a hotel or convention center.

It is important to choose a location that will accommodate the correct amount of people, as well as a location that can properly handle hosting the event.

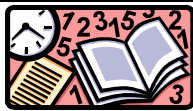
How?

The last question you need to ask your client in order to plan their event is “How?” The question of “How?” is an open-ended question that can help you fill in the blanks of your event. Here is a list of some possible “How” questions.

- How long will the event last?

- How do you plan on developing a theme for your event? If it is a children’s birthday party, do you want a sports theme or a cartoon character theme?
- How will you pay for the event? Will you sell tickets or is the event free for the participants?
- How do you plan on serving your guests? Will there be food, snacks, or beverages?
- How do you plan on notifying your guests about the event? Is it invitation only or is it open to the public?

These are just some examples of possible “How” questions you may ask your clients.



EXERCISE 3.1

Name and explain the five factors you should find out from your client when preparing to plan an event on their behalf.

- 1.
- 2.
- 3.
- 4.
- 5.

Now that we know what basic questions are needed in order to find out what your client’s needs are, let’s get some practice.

THE QUESTIONS TO ASK YOUR CLIENTS

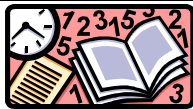
We are going to practice developing a question format in order to help your prospective clients obtain a clear understanding of what services

they want in order for their event to be successful. Many times a client may say that they want to throw a party, but they do not initially give you details on how they want the party presented. It is your job to find out.

Below is a scenario that demonstrates how to get the answers you need from a client.

SCENARIO 1

You receive a call from Rita Jackson. Rita left a message on your business voicemail. She wants to throw a 50th birthday party for her husband Bill. She wants to hire you for the job, but gives no other details.



EXERCISE 3.2

What questions should you ask Rita in order to properly plan her husband's 50th birthday party?

There are several questions you would need to ask in a situation like this. Below Jane Smith, the owner of Special Occasions, Inc., returns Rita's call.

Pay close attention to the questions the Jane asks Rita Jackson regarding her husband's 50th birthday party.

SCENARIO 1 CONTINUED

Jane: Hello. May I please speak to Rita Jackson?

Rita: This is Rita. How may I help you?

Jane: Hello Rita. This is Jane Smith from Special Occasions, Inc. I am returning your call regarding hosting a 50th birthday party for your husband? By the way, what is your husband's name?

Rita: My husband's name is Bill.

Jane: What day is your husband's birthday?

Rita: My husband's birthday is April 20.

Jane: Rita, as I look on my calendar. I see that April 20 is a Tuesday. Were you planning on throwing your husband's party on his exact birthday or on another date such as a weekend?

Rita: It would probably be best to throw the party the weekend before his birthday.

Jane: What about Saturday night, April 17.

Rita: That would be great!

Jane: Rita, it is also important to have an alternative date when planning an event. Would you consider planning your event on Friday, April 16 if needed?

Rita: Jane that would be a good idea.

Jane: Where do you plan on hosting your husband's birthday party? Do you plan on throwing it in your home or were you interested in renting a location?

Rita: I think it would be best to throw a party at a rented location. This is such a special occasion; I plan on inviting a lot of people!

Jane: How many people are you planning on inviting to the party?

Rita: Between 100 and 150 people.

Jane: What are your refreshment plans? Were you planning on having a sit down dinner or just appetizers, party refreshments, and cake? I would need to know this information in order to determine a suitable site for your husband's party.

Rita: I would like a sit-down dinner. I want this to be a special occasion, where everyone dresses up, has a nice dinner, and dances the whole night through.

Jane: Well in order to do this, we can look into reserving the community country club or the banquet hall of a local hotel in the area. We can also decide on local caterers, the dinner menu, and decorations.

Rita: That would be wonderful!

Jane: Will there be entertainment? Such as a D.J. or a Band?

Rita: My husband loves Jazz. I would love to have a jazz band. He would really enjoy that!

Jane: What we can do now is set up a consultation. I can either come to your house or you can come to my office to discuss the details and work on an event proposal. What day would you like to set up your appointment?.....

END OF SCENARIO

In this scenario, Jane was able to obtain the: Who, What, Where, When, and How.

- WHO? – The target audience is friends and family.
- WHAT? - Bill Jackson's 50th Birthday Party
- WHEN? – April 17th
- WHERE? – The community country club or a local hotel banquet hall.
- HOW? - By renting a location, hiring a caterer, sending out invitations, hiring entertainment, and hiring a decorator.

When Jane first received a call from the client, she had no idea what the client's expectations were. Just by asking a few questions, she was able

to discover the essentials of who, what, where, when, and how. This is what you will have to do in order to be a successful event planner and cater to your client's needs.

The Initial Client Contact Form will assist you in finding out your client's needs. You can find it in your Manual.

Now that you have learned the basics of developing a plan to properly serve your client's needs, let's move on to the tutor marked assignment for Module 3.

REMINDER

Have you completed the following exercises?

- Exercise 3.1
- Exercise 3.2

Check each box when you have completed the exercises. When you have completed the exercises you can move on to the assignment that follows.

SUMMARY

1. You realize that by using the questions, who? what? where? when? and how? you can discover the client's needs.
2. You know how to plan correctly for the right type of event.
3. You have read a scenario that demonstrates how to use the what? where? when? and how? questions when communicating to clients.

ASSIGNMENT 3

Read the following scenario. Using the questions:

- Who?
- What?
- When?
- Where?
- How?

Develop an outline to use, so that you can successfully discover your client's expectations. Feel free to use the client information sheet [*Not Included Here*] as your guide.

SCENARIO

Karen wants to throw an anniversary party for her parents. They have been married for 35 years. She wants to hire your event planning business for the job. What questions can you ask Karen in order to properly plan her party?

When you have completed the assignment send or email it to your tutor.

If you email your assignment, make sure you include your name and assignment number at the top of your work.

Well, that's the end of the extract. If you want to know more, you'll have to enroll!

We look forward to welcoming you on to the course, and helping you become a professional Event Planner.