Project Management and Event Planning for Office Administrators

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Contents

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A special thank you to Heather Beecroft, who authored multiple chapter sections in this book.

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Use of AI

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- ChatGPT was used to help the author brainstorm a structure for the chapters on event planning. In sections where the author used AI to provide more specific examples or content, the sources are listed.
- ChatGPT was used to generate the Sunny Horizons, Inc. logo with the following prompt:*"I need to create a logo for a fictitious company to use in a case study for a College class. The fictitious company name is Sunny Horizons, Inc., and it is based in London, Ontario. It will soon be expanding to Calgary, Alberta. The logo should be simple but colourful and easy to use as a stand-alone or incorporate in a letterhead."* It asked me about complexity and colour scheme, to which I responded, *"6, please and warm and bright colours."* The image was then modified to add the Company Name.

Collaborators

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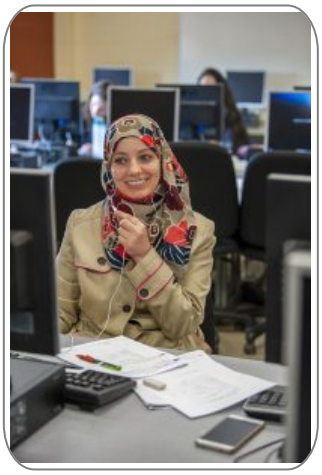
About this Book



As Office Administrators, we are often looked to as the folks who “get stuff done.” Many times, we are tasked with jobs and projects that are new to us, and we have the opportunity to design the path that our teams will take as they work through those projects.

This book is a compilation and adaptation of existing Project Management and Event Planning open education resources. The goal is to focus on topics that are most relevant for Office Administrators that will help us design those paths.

We welcome feedback about ways the book could be improved. Please reach out if you have ideas for improvement.

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CASE STUDY

Sunny Horizons, Inc.

Company Expansion – Sunny Horizons, Inc.

Background

Sunny Horizons, Inc. logo

Sunny Horizons Inc., a mid-sized corporation headquartered in London, Ontario, has recently decided to expand its operations to another province to better serve its growing client base. The company specializes in sustainable outerwear manufacturing for adults and children, focusing on eco-friendly materials and ethical production practices. Sunny Horizons was founded by Jordan Matthews, a graduate of the Fanshawe College Fashion Marketing & Management program, with a vision to provide high-quality, environmentally responsible outerwear options for Canadian consumers.

Over the past ten years, Sunny Horizons has seen significant success in London, establishing a loyal customer base and growing its online sales. A large percentage of their online orders have consistently come from the western half of the country, making westward expansion to set up an additional plant and distribution warehouse the logical next step. After extensive market research and analysis, the company chose Calgary, Alberta, for its new branch. This decision was driven by several key factors:

1. **Economic Growth**: Alberta has shown robust economic performance, with Calgary emerging as a hub for business and innovation.
2. **Strategic Location**: Calgary's central location in Western Canada provides access to a larger customer base and opportunities for regional partnerships.
3. **Workforce Availability**: The city offers a skilled and diverse talent pool, making it easier to recruit qualified professionals locally.
4. **Market Opportunities**: Alberta's industries align well with Sunny Horizons' sustainable manufacturing model, presenting significant growth potential.

The expansion is a significant milestone for Sunny Horizons Inc., and the team is committed to ensuring the new branch is fully operational within six months. To achieve this ambitious goal, a

committee of 15 staff members from various departments has been formed. The committee includes representatives from human resources, operations, IT, marketing, and finance.

Case Study Purpose

While the committee is responsible for the planning and execution of the project, the office administrator, Pat, has been assigned to provide essential administrative support throughout the process.

Pat's role will be crucial in ensuring the project's success, as they will act as the central point of coordination and communication for the committee. You will focus on viewing this case study from Pat's perspective. You will learn more about the OA role on a project team. The majority of the Case Study is presented in this chapter, but you may see components of the Case Study presented in other chapters and as part of class discussions/activities.

Your major assignment in the first half of the term will be to develop a variety of documents that you may need as you are working to support project teams. You will use the information in this Case Study to develop those documents for this class.

Project Objectives

The committee's key objectives for the next six months include:

1. **Finalizing Office Design and Setup**: Work with contractors to design and furnish the office space, ensuring it aligns with company standards and accommodates up to 50 employees. This involves selecting ergonomic furniture, designing collaborative workspaces, and ensuring compliance with safety regulations.
2. **Recruiting and Onboarding Staff**: Coordinate with HR to recruit, hire, and onboard local staff. The recruitment process will focus on attracting skilled professionals to fill key roles, followed by an onboarding plan to integrate new employees into the company culture.
3. **Establishing IT Infrastructure**: Ensure the new branch has fully operational IT systems, including internet connectivity, workstations, and telecommunication services. This also includes setting up secure networks and coordinating with vendors to provide ongoing technical support.
4. **Marketing and Launch Campaign**: Develop and execute a marketing strategy to announce the new branch and attract local clients. This includes creating promotional materials, utilizing social media platforms, and organizing outreach events to establish and generate excitement about the company's presence in Calgary.
5. **Legal and Compliance Matters**: Address any provincial regulatory requirements, including business registration and employee standards. This also entails collaborating with legal advisors to ensure all operational policies adhere to Alberta's laws.
6. **Logistical Coordination**: Oversee the shipment and delivery of necessary equipment and supplies to the new location. This includes creating a timeline for deliveries, tracking shipments, and troubleshooting any issues to avoid delays.

Challenges

The project comes with several challenges, including:

- **Tight Timeline**: Completing all tasks within six months requires meticulous scheduling, resource allocation, and prioritization. Any delays in one area, such as securing office equipment or hiring staff, could impact subsequent steps.
- **Cross-Department Coordination**: The committee members come from different departments, each with their own priorities. Effective communication and collaboration will be essential to ensure alignment and prevent misunderstandings or duplicated efforts.
- **Budget Constraints**: The expansion must be completed within a set budget, requiring careful financial planning. Unexpected costs, such as delays in construction or last-minute IT upgrades, could strain financial resources.
- **Remote Coordination**: Since the planning team is based in Ontario, working with contractors, vendors, and new employees in Alberta will pose logistical challenges. Time zone differences, communication gaps, and limited in-person oversight could create obstacles.
- **Unplanned Staff Changes**: Midway through the project, the IT committee member resigns, requiring the onboarding of a new team member. This disrupts continuity, as the replacement must quickly understand the project scope, vendor contracts, and security protocols to ensure smooth IT infrastructure implementation.

Pat's Role as Office Administrator

As the office administrator, Pat's primary responsibilities will include:

1. **Scheduling and Meeting Coordination**: Organizing regular committee meetings, preparing agendas, and documenting minutes.
2. **Document Management**: Maintaining an organized repository of all project-related documents, including contracts, budgets, and schedules.
3. **Vendor and Contractor Communication**: Acting as a liaison between the committee and external vendors or contractors, ensuring timely updates and deliverables.
4. **Task Tracking**: Monitoring the progress of tasks and milestones using a simple project management tool, chosen by the team.
5. **Event Planning**: Assisting with arrangements for the grand opening event, including invitations, venue booking, and catering.
6. **Crisis Management**: Coordinating efforts to onboard the new IT representative quickly and ensuring that any critical IT tasks are reassigned or adjusted during the transition period.

This case study will provide a realistic and cohesive framework to explore project management concepts tailored for office administrators.

You will be presented with several opportunities in the first few chapters of this text to refer back to this Case Study Overview to refine your Administrative Professional skills.

Relevant information:

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Case Source

OpenAI. (2025). *ChatGPT.* [Large language model]. https://chat.openai.com/chat

Prompt: "*Can you write a case study for me that introduces a project that will require an office administrator to support an Ontario-based corporate team of at least fifteen people who are working*

as a committee to plan and execute the opening of a branch of their office in a different province (not Quebec). The new branch/division will open six months from now, and all they have at this point is a location." After reviewing the initial response by ChatGPT, Blythe engaged in considerable editing to get the basic idea turned into the case study seen above. Edited by the author.

CHAPTER 1 - INTRODUCTION TO PROJECT MANAGEMENT & THE PROJECT LIFECYCLE

Chapter Overview

1.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Define the characteristics of a project.
- Compare the difference between traditional and Agile project management.
- Describe how program management differs from project management.
- Explain the three broad categories of projects.
- Explain the four phases of project management.
- Describe the documentation produced during the project initiation.

There is no greater example of the art and science of project management (PM) than those demonstrated in building the Pyramids of Egypt. Since then, builders and engineers have applied specific processes systematically, and these have evolved into PM. Today, in every field of work, PM is an essential practice to achieve project success. The objective, in general, is to establish and deliver the customer objectives in an organized and detailed manner. Whether the business is in production, construction, or service delivery, planning and carrying out a project requires clearly defined processes.

While the general management function may include many tasks, PM is specifically oriented toward processes and requires a specific set of tools and skills. When PM is performed correctly, organizations benefit. PM can reduce risk and improve the likelihood of success. It approaches tasks in an organized, detailed, and accountable way. Even when organizations have limited resources and a small chance of success, PM experts can help lead through recessions and economic uncertainty and ensure future strategic goals are met. Therefore, performing PM requires dedicated individuals with good discipline who understand the processes and are able to follow through to completion. Good project managers keep the project on track and ensure the alignment of project objectives within the strategic objectives of the organization.

The starting point in discussing how projects should be properly managed is first to understand what a project is and, just as importantly, what it is not.

1.2. Project Management (PM) Definition

Project

A **project** has distinctive attributes that distinguish it from ongoing work or business operations. Specifically, projects are temporary in nature. Therefore, they are not an everyday business process, but they are unique and have definitive start dates and end dates. This characteristic is important because a large part of the project effort is dedicated to ensuring that the project is completed at the appointed time. To do this, schedules are created showing when tasks should begin and end. Projects can last minutes, hours, days, weeks, months, or years.

Projects exist to bring about a product or service that has not existed before. In this sense, a project is unique. Maybe it's been done in a very similar fashion before, but never exactly in this way. For example, although the Ford Motor Company is in the business of designing and assembling many kinds of vehicles, each model that Ford designs and produces can be considered a unique project. The models differ from each other in their features and are marketed to people with various needs. An SUV serves a different purpose and clientele than a luxury car. The design and marketing of these two models are unique projects. However, the actual assembly of the cars is considered an **operation** (i.e., a repetitive process that is followed for most makes and models).

A project is completed when its goals and objectives are accomplished. It is these goals that drive the project and all the planning and implementation efforts undertaken to achieve them. Sometimes, projects end when it is determined that the goals and objectives cannot be accomplished or when the product or service of the project is no longer needed, and the project is cancelled.

Definition of a Project

There are many written definitions of a project. All of them contain the key elements described above. However, for those looking for a formal definition of a project, the Project Management Institute (PMI) defines a project as a temporary endeavour undertaken to create a unique product, service, or result. The temporary nature of projects indicates a definite beginning and end. The end is reached when the project's objectives have been achieved, when the project is terminated because its objectives will not or cannot be met, or when the need for the project no longer exists.

The term "project" is used in several ways in popular culture, from describing everyday tasks (planting a garden, hanging a picture, running errands) to large-scale enterprises (building a house, constructing a new highway). However, when professional project managers talk about projects, they use a narrower definition. Let's start out with the six defining characteristics of a project. Just about every book, organization, or standards body in the project management field agrees that a project:

- is a temporary endeavour with a defined start and end.
- has a specific objective.
- has customers or stakeholders.
- has constraints, such as time, cost, and scope.
- has measures for success.
- includes some amount of uncertainty.

Watch the video *What is a Project* for more information on how these six aspects help define what a project is and is not.

Video: What is a Project? by Prof C [3:23] is licensed under the Standard YouTube License. Captions and transcripts are available on YouTube.

1.3. Types of Projects

There are three broad categories of projects to consider: Strategic Projects, Operational Projects, and Compliance Projects (Figure 1.1).

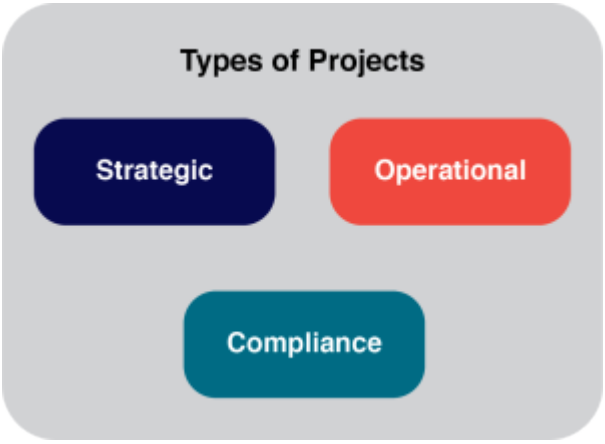


Figure 1.1: Three broad categories of projects

- **Strategic** Projects involve creating something new and innovative. A new product, a new service, a new retail location, a new branch or division, or even a new factory might be a strategic project because it will allow an organization to gain a strategic advantage over its competitors.
- **Operational** Projects improve current operations. These projects may not produce radical improvements, but they will reduce costs, get work done more efficiently, or produce a higher-quality product.
- **Compliance** Projects must be done in order to comply with an industry or governmental regulation or standard. Often there is no choice about whether to implement a project to meet a regulation, but there may be several project options to consider, any of which would result in meeting compliance requirements.

Traditional Project Management

As the administrative professional supporting an project team, you will not be responsible for the ins and outs of the different types of projects, but it is important that you are familiar with the terminology that will be used in the meetings you are supporting.

While project management can be traced back to the building of the Great Pyramids in Egypt, it was really in the post-WW2 industrial boom of the 1950s that project managers started to develop the tools and techniques used in modern project management. These tools were used to complete large industrial and military projects, where the scope of work (what we need to accomplish in a project) was well defined. For example, the scope of what we have to do can be planned out well when we are constructing an apartment building, planning a multi-day conference, or moving from one office building to another.

These traditional techniques have been elaborated and standardized by organizations such as the Project Management Institute (PMI) in the US, The International Project Management Association (headquartered in Switzerland), and AXELOS (the organization behind the PRINCE2 certification used in Great Britain). These traditional techniques were also adapted to software development. Techniques such as **waterfall** (where phases are sequential) and **function point analysis** (a set of rules to measure functionality to users) were advanced as effective ways to manage software development projects. However, as the world of software development changed—from large, time-consuming projects that were loaded on mainframe computers to fast-moving, fast-changing, internet-based applications many programmers found waterfall and similar methods to be limiting. These techniques lacked flexibility and were inadequate to deal with a rapidly changing, competitive landscape. As a result, a "revolution" of sorts was mounted, and out of that revolution came several so-called Agile project management methods.

Agile Project Management

Agile is a broad term for project management techniques that are **iterative** in nature. Rather than trying to develop all aspects of a project or software application and then presenting that result to the customer after a long development cycle (6 to 24 months), Agile techniques use short development cycles in which features of high value are developed first, and a working product/software can be reviewed and tested at the end of the cycle (20-40 days).

1.4. Aspects of Project Management

The Science of Project Management

Project management has been around for centuries, if not millennia. From the building of the pyramids to the construction of the great buildings of 19th century London, people have developed ways to break down large projects into smaller, more manageable chunks, schedule the work, and obtain the materials needed for the projects. During that time, many tools were developed to manage projects. However, it was not until the large, highly complex defence projects undertaken by the United States during the 1950s that a push for a more scientific and data-driven management approach to projects was driven, which was the beginning of the science of modern-day project management.

Project Management Institute

The Project Management Institute (PMI) started in 1969 as an effort to share best practices, and today, it is a non-profit organization with over 500,000 members. PMI has chapters throughout the world, and each offers additional benefits in the form of professional development and networking opportunities.

Project Management Body of Knowledge

PMI has codified the standards for project management in the Project Management Body of Knowledge (PMBOK) guide. The PMBOK is best used as a reference guide; it is not recommended for cover-to-cover reading. The PMBOK Guide has been recognized as a Standard by the American National Standards Institute (ANSI) and the Institute of Electrical and Electronics Engineers (IEEE).

The PMBOK guide is organized into ten knowledge domains:

1. Project Integration Management
2. Project Scope Management
3. Project Time Management
4. Project Cost Management
5. Project Quality Management
6. Project Human Resource Management
7. Project Communications Management
8. Project Risk Management
9. Project Procurement Management
10. Project Stakeholder Management

Project Constraints

Managing a project includes identifying your project's requirements and writing down what everyone needs from the project. What are the objectives for your project? When everyone understands the goal, it's much

easier to keep them all on the right path. Make sure you set mutually agreed-upon goals to avoid team conflicts later on. Understanding and addressing the needs of everyone affected by the project means the end result of your project is far more likely to satisfy your stakeholders. Last but not least, as project manager, you will also be balancing the many competing project constraints.

On any project, you will have a number of project constraints that are competing for your attention. They are cost, scope, quality, risk, resources, and time.

- **Scope** is what the project is trying to achieve. It entails all the work involved in delivering the project outcomes and the processes used to produce them. It is the reason for and the purpose of the project.
- **Time/Schedule** is defined as the time to complete the project. Time is often the most frequent project oversight in developing projects. This is reflected in missed deadlines and incomplete deliverables. Proper control of the schedule requires the careful identification of tasks to be performed and accurate estimations of their durations, the sequence in which they are going to be done, and how people and other resources are to be allocated. Any schedule should take into account vacations and holidays.
- **Cost** is the budget approved for the project, including all necessary expenses needed to deliver the project. Within organizations, project managers have to balance between not running out of money and not underspending because many projects receive funds or grants that have contract clauses with a "use it or lose it" approach to project funds. Poorly executed budget plans can result in a last-minute rush to spend the allocated funds. For virtually all projects, cost is ultimately a limiting constraint; few projects can go over budget without eventually requiring corrective action.
- **Quality** is a combination of the standards and criteria to which the project's products must be delivered for them to perform effectively. The product must perform to provide the functionality expected, solve the identified problem, and deliver the benefit and value expected. It must also meet other performance requirements, or service levels, such as availability, reliability, and maintainability, and have an acceptable finish and polish. Quality on a project is controlled through **quality assurance (QA)**, which is the process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards.

Let's Review

Text Description
This activity contains a set of dialog cards, which are described below.
Activity Description or Instruction: On any project, you will have a number of project constraints that are competing for your attention. Flip the Dialogue Card to review the key areas of constraints:

1. Dialog Text: **Cost**
2. Dialog Text: **Scope**
3. Dialog Text: **Schedule**
4. Dialog Text: **Time**
5. Dialog Text: **Quality**

1.5. Life Cycle

The project manager and project team have one shared goal: to carry out the work of the project for the purpose of meeting the project's objectives. Every project has beginning and middle periods, during which activities move the project towards completion and an ending that is either successful or unsuccessful. A standard project typically has the following four major phases (each with its own agenda of tasks and issues): **initiation, planning, implementation/execution, and closure**. Taken together, these phases represent the path a project takes from the beginning to its end and are generally referred to as the project's "**life cycle**."

A traditional project will go through different (overlapped) phases, while the monitoring process takes place continuously from the initiation phase to the closing phase. **Monitoring** can be considered as a floating process required to ensure the alignment of the project processes with the project scope. During the life cycle, the execution phase will require the most effort from the project team and hence can be seen as the most productive phase (Figure 1.4).

Initiation Phase

During the first of these phases, the initiation phase, the project objective or need is identified; this can be a business problem or opportunity. An appropriate response to the need is documented in a business case with recommended solution options. A feasibility study is conducted to investigate whether each option addresses the project objective, and a final recommended solution is determined. Issues of feasibility ("Can we do the project?") and justification ("Should we do the project?") are addressed.

Once the recommended solution is approved, a project is initiated to deliver the approved solution, and a project manager is appointed. Thereafter, the major deliverables and the participating work groups are identified, and the project team begins to take shape. Approval is then sought by the project manager to move on to the detailed planning phase.

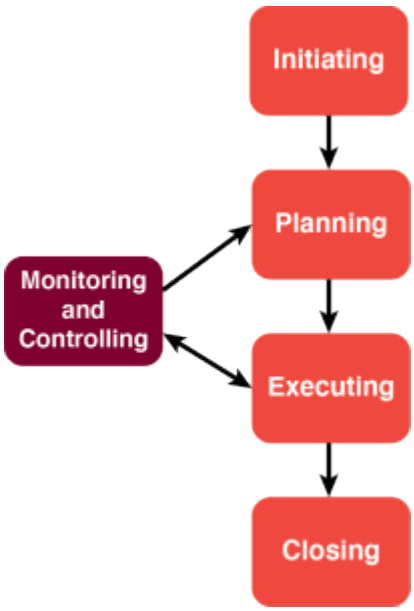


Figure 1.2: "Project management phases," CC-BY-SA 3.0.

Planning Phase

The next phase, the planning phase, is where the project solution is further developed in as much detail as possible, and the steps necessary to meet the project's objective are planned. In this step, the team identifies all of the work to be done. The project's tasks and resource requirements are identified, along with the strategy for producing them. This is also referred to as "**scope management**." A project plan is created outlining the activities, tasks, dependencies, and timeframes. The project manager coordinates the preparation of a project budget by providing cost estimates for the labour, equipment, and materials costs. The budget is used to monitor and control cost expenditures during project implementation.

Once the project team has identified the work, prepared the schedule, and estimated the costs, the three fundamental components of the planning process are complete. This is an excellent time to identify and try to deal with anything that might pose a threat to the successful completion of the project. This is called **risk management** (read more about this in "Chapter 6 – Risk Management & Contingency Planning"). In risk management, "high-threat" potential problems are identified along with the action that is to be taken on each

high-threat potential problem, either to reduce the probability that the problem will occur or to reduce the impact on the project if it does occur. This is also a good time to identify all project stakeholders and establish a communication plan describing the information needed and the delivery method to be used to keep the stakeholders informed.

Finally, you will want to document a quality plan, providing quality targets, assurance, and control measures, along with an acceptance plan, listing the criteria to be met to gain customer acceptance. At this point, the project would have been planned in detail and is ready to be executed.

Implementation/Execution Phase

During the third phase, the implementation/execution phase, the project plan is put into motion, and the work of the project is performed. It is important to maintain control and communicate as needed during implementation. Progress is continuously monitored, and appropriate adjustments are made and recorded as variances from the original plan. In any project, a project manager spends most of the time in this step. During project implementation/execution, people carry out the tasks, and progress information is reported through regular team meetings. The project manager uses this information to maintain control over the direction of the project by comparing the progress reports with the project plan to measure the performance of the project activities and take corrective action as needed. The first course of action should always be to bring the project back on course (i.e., to return it to the original plan). If that cannot happen, the team should record variations from the original plan and record and publish modifications to the plan. Throughout this step, project sponsors and other key stakeholders should be kept informed of the project's status according to the agreed-on frequency and format of communication. The plan should be updated and published on a regular basis.

Status reports should always emphasize the anticipated endpoint in terms of cost, schedule, and quality of deliverables. Each project deliverable produced should be reviewed for quality and measured against the acceptance criteria. Once all of the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.

Closing Phase

During the final closure or completion phase, the emphasis is on releasing the final deliverables to the customer, handing over project documentation to the business, terminating supplier contracts, releasing project resources, and communicating the closure of the project to all stakeholders. The last remaining step is to conduct lessons-learned studies to examine what went well and what didn't. Through this type of analysis, the wisdom of experience is transferred back to the project organization, which will help future project teams.

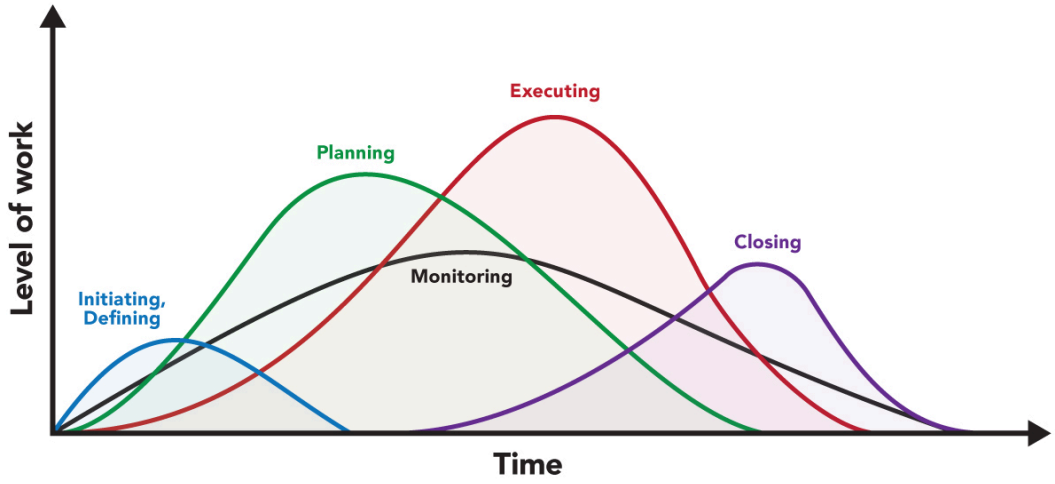


Figure 1.3: Illustration of work activity-time graph for a typical project life cycle.

1.6. Key Terms

Key Terms

- **Agile**: is a broad term for project management techniques that are iterative.
- **Compliance Projects:** These are completed to comply with industry or governmental regulations or standards.
- **Cost**: The budget approved for the project includes all necessary expenses needed to deliver the project.
- **Function Point Analysis:** a set of rules to measure the functionality to users
- **Implementation:** the project plan is put into motion and the project's work is performed.
- **Initiation:** the project objective or need is identified; this can be a business problem or opportunity.
- **Iterative**: repetitive
- **Life Cycle**: The path a project takes from the beginning to its end.
- **Operations:** Involve continuous work without an ending date and with the same processes repeated to produce the same results.
- **Operational Projects:** Improve current operations. These projects may not produce radical improvements, but they will reduce costs, get work done more efficiently, or produce a higher-quality product.
- **Program**: When a group of projects is arranged towards achieving a specific goal. A cluster of interconnected projects.
- **Project(s):** Temporary initiatives that companies implement alongside their ongoing operations to achieve specific goals. They are clearly defined packages of work, bound by deadlines and endowed with resources, including budgets, people, and facilities.
- **Quality:** A combination of the standards and criteria to which the project's products must be delivered for them to perform effectively.
- **Quality Assurance (QA)**: The process of evaluating overall project performance regularly to provide confidence that the project will satisfy the relevant quality standards.
- **Risk Management:** Anticipating and identifying potential problems that would threaten the success of the project and developing a plan to reduce the impact of that threat if it occurs.
- **Scope:** The reason and purpose for the project, or what the project is trying to achieve.
- **Scope Management:** The strategy designed to recognize and organize the project's tasks and resources.
- **Strategic projects**: Involve creating something new and innovative. A new product, a new service, a new retail location, a new branch or division, or even a new factory might be a strategic project because it will allow an organization to gain a strategic advantage over its competitors.
- **Time**: is defined as the time to complete the project. Time is often the most frequent project oversight in developing projects.
- **Waterfall:** A project management approach where phases are presented sequentially.

1.7. What's my Role?

The Administrative Professional's Role

As an administrative professional, you may not be the project manager, but you play a key role in supporting projects from start to finish. Your organizational skills, attention to detail, and ability to coordinate tasks help keep the project running smoothly. Whether you are scheduling meetings, tracking deadlines, or managing project documents, your work ensures that the team stays on track.

Understanding the difference between a project and an ongoing operation will help you recognize when your tasks contribute to something temporary and unique rather than everyday business activities. You may be asked to assist in organizing project materials, keeping communication flowing between team members, or maintaining records of important decisions. By knowing the overall life cycle of a project, you can better anticipate what support will be needed at each stage.

Even if you are not making major project decisions, your role is essential in making sure those decisions are carried out efficiently. By mastering the basics of project management, you can become a reliable and valuable part of any project team.

Practical Tips

- *Stay Organized from the Start* – Keep a dedicated folder (digital or physical) for project-related documents, emails, and meeting notes. This will help you quickly access important information when needed.
- *Clarify Your Responsibilities* – Early on, ask your manager or project lead how you can best support the team. Understanding expectations from the beginning will help you focus on the right tasks.
- *Determine a Communication Plan* – Clear and timely communication helps prevent missed tasks and confusion.
- *Learn the Basics of Project Tracking* – Even if you're not managing the project, familiarizing yourself with tools like task lists, Gantt charts, or project management software (like Asana, Trello, or Microsoft Project) will help you stay informed and contribute effectively. You will learn about all of these things in future chapters.

CHAPTER 2 - COLLABORATION AND WORKING TO SUPPORT A TEAM

Chapter Overview

2.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- List the benefits of working on a team.
- Explain three types of teams.
- Discuss project culture.
- Explain three types of meetings.
- Outline the benefits and challenges of virtual project management.
- Explain different types of collaborative software.
- Outline the parameters for helping your team select appropriate collaborative software.

2.2. Working With Teams

A **team** is a collaboration of people with different personalities led by a person with a favoured leadership style. Tuckman's team development model – Forming, Storming, Norming, Performing, and Adjourning – is elegant and helpful in explaining team development behaviour. The model explains that relationships are established as the team develops maturity and ability and the leader changes leadership style. Beginning with a direct style, the leader moves through coaching, then participating, finishing with delegating.

Understanding the interaction styles of various personality types is a helpful skill in your role as an administrative professional.

Trust

Trust is the foundation for all relationships within a project. Without a minimum level of trust, communication breaks down, and eventually, the project suffers in the form of increasing costs and slipping schedules. Often, when reviewing a project where performance problems have captured the attention of upper management, the evidence of problems is the increase in project costs and the slippage in the project schedule. The underlying cause is usually blamed on communication breakdown. With deeper investigation, the communication breakdown is associated with a breakdown in trust.

On projects, trust is the filter through which we screen shared information and the filter we use to screen the information we receive. The more trust that exists, the easier it is for information to flow through the filters. As trust diminishes, the filters become stronger, information has a harder time getting through, and projects that are highly dependent on an information-rich environment will suffer from information deprivation.

Contracts and Trust Relationships

A project typically begins with a charter or contract. A **contract** is a legal agreement that includes penalties for any behaviour or results not achieved. Contracts are based on an adversarial paradigm and do not lend themselves to creating an environment of trust. Contracts and charters are necessary to establish the scope of the project, among other things, but they are not conducive to establishing a trusting project culture.

A relationship of mutual trust is less formal but vitally important. When a person or team enters into a relationship of mutual trust, each person's reputation and self-respect are the drivers in meeting the intent of the relationship. A relationship of mutual trust within the context of a project is a commitment to an open and honest relationship. Nothing enforces the commitments in the relationship except the integrity of the people involved. Smaller, less complex projects can operate within the boundaries of a legal contract, but larger, more complex projects must develop a relationship of mutual trust to be successful.

Creating Trust

Building trust in a project begins with the project manager. On complex projects, the assignment of a project manager with a high trust reputation can help establish the trust level needed. Project managers can also ensure that the official goals (stated goals) and operational goals (goals that are reinforced) are aligned. The project manager can create an atmosphere where informal communication is expected and reinforced.

Informal communication is important for establishing personal trust among team members and with the client. Allotting time during project start-up meetings to allow team members to develop personal

relationships is important to establishing the team's trust. The informal discussion allows for a deeper understanding of the whole person and creates an atmosphere where trust can emerge.

Team Support

Office administrators play a vital role in fostering collaboration and trust within a project team through a variety of tasks and roles. First, they ensure clear and consistent communication by managing meeting notes, tracking action items, and keeping team members informed. Second, they create a supportive environment by coordinating resources, anticipating needs, and resolving logistical challenges before they become obstacles. Third, they promote transparency by maintaining accurate project documentation and ensuring information is accessible to all stakeholders. Finally, they contribute to team morale by recognizing contributions, facilitating team-building activities, and fostering a positive, inclusive work culture. Through these efforts, office administrators help project teams stay organized, engaged, and focused on shared goals.

> Are you starting to appreciate how significant your role will be even though you're not the leader of this team?

2.3. Types of Teams

Teams can outperform individual team members in several situations. The effort and time invested in developing a team and the work of the team are large investments of project resources, and the payback is critical to project success. Determining when a team is needed and then chartering and supporting the development and work of the team are other critical project management abilities.

Teams are effective in several project situations:

- When no one person has the knowledge, skills, and abilities to either understand or solve the problem
- When a commitment to the solution is needed by large portions of the project team
- When the problem and solution have cross-project functions
- When innovation is required

Individuals can outperform teams on some occasions. An individual tackling a problem consumes fewer resources than a team and can operate more efficiently—as long as the solution meets the project's needs. A person is most appropriate in the following situations:

- When speed is important
- When one person has the knowledge, skills, and resources to solve the problem
- When the activities involved in solving the problem are very detailed
- When the actual document needs to be written (Teams can provide input, but writing is a solitary task.)

In addition to knowing when a team is appropriate, the project manager must also understand what type of team will function best.

Functional Teams

A **functional team** refers to the team approach related to the project functions. The engineering team, the procurement team, and the project controls team are examples of functional teams within the project. On a project with a low complexity profile that includes low technological challenges, good team member experience, and a clear scope of work, the project manager can utilize well-defined functional teams with clear expectations, direction, and strong vertical communication.

Cross-Functional Teams

Cross-functional teams address issues and work processes that include two or more of the functional teams. The team members are selected to bring their functional expertise to address project opportunities.

Problem-Solving Teams

Problem-solving teams are assigned to address specific issues that arise during the life of the project. The project leadership includes members who have the expertise to address the problem. The team is chartered to address that problem and then disband.

Characteristics of Project Culture

A **project culture** represents the shared norms, beliefs, values, and assumptions of the project team. Understanding the unique aspects of a project culture and developing an appropriate culture to match the complexity profile of the project are important project management abilities.

Culture is developed through the communication of:

- The priority
- The given status
- The alignment of official and operational rules

Official rules are the rules that are stated, and operational rules are the rules that are enforced. Project managers who align official and operational rules are more effective in developing a clear and strong project culture because the project rules are among the first aspects of the project culture to which team members are exposed when assigned to the project.

Creating a Culture of Collaboration

A project manager met with his team prior to the beginning of an instructional design project. The team was excited about the prestigious project and the potential for career advancement involved. With this increased competitive aspect came the danger of selfishness and backstabbing. The project leadership team told stories of previous projects where people were fired for breaking down the team efforts and often shared inspirational examples of how teamwork created unprecedented successes—an example of storytelling. Every project meeting started with teambuilding exercises—a ritual—and any display of hostility, or separatism was forbidden—taboo—and was quickly and strongly cut off by the project leadership if it occurred.

Culture guides behaviour and communicates what is important and is useful for establishing priorities. On projects that have a strong culture of trust, team members feel free to challenge anyone who breaks confidence, even managers. The culture of integrity is stronger than the cultural aspects of the power of management.

2.4. Team Meetings

As an Office Administrator, it's important to understand that team meetings can vary based on their purpose, the leadership style used, and the personality types of team members.

Types of Meetings

- **Action Item**: Focused on information sharing with minimal discussion.
- **Management**: Focused on developing and progressing goals.
- **Leadership**: Reflective and focused on the project's mission and culture.

Action Item Meetings

Action item meetings are short and focused on understanding the immediate priorities for the project, individual roles, and specific activities. These meetings are for sharing information, not solving problems. If any issues come up, they are assigned to someone, and a separate meeting is scheduled to address them. Action item meetings usually cover activities that need to be completed within a week.

These meetings are fact-based and information-oriented, with minimal dialogue except for clarification questions. If a discussion is needed or disagreements arise, a separate problem-solving meeting is set up. For smaller topics, this follow-up meeting might happen right after the action item meeting and include only those interested in the outcome.

The project manager keeps action item meetings short and focused on the necessary information for the short-term project plan. They restate the priorities and who is responsible for each activity. These meetings can also include reviews of safety or security procedures if relevant to the project. The leadership approach in these meetings focuses on data, actions, and commitments. Any interpersonal issues observed by the project manager are addressed in a different forum.

Management Meetings

Management meetings are longer and focused on planning. These meetings are about developing plans, tracking progress, and making adjustments based on new information.

Purpose of Management Meetings

Management meetings involve discussions to understand the progress of the current plan. These discussions are based on data and the experiences and opinions of project leaders. Disagreements about the data are encouraged to gain a deeper understanding. The goal is to reach a common understanding of the project's status.

Setting Goals

Management meetings also focus on setting mid-term goals. For larger projects, these goals might be monthly or quarterly. For smaller projects, weekly goals are more common. The project manager leads discussions on what needs to be done to meet project milestones, potential barriers, and key resources needed. The team develops goals that integrate various functions and focus on priorities.

Examples of goals during the conceptual phase include:

- Developing a list of long-lead procurement items and defining critical dates
- Creating a human resources plan to identify critical positions
- Building agreements with the client on the project scope

These goals are measurable and have specific time frames. They serve as positive motivators and are easy to remember.

Monthly Focus

The focus of management meetings may change throughout the month:

- Early in the month: Address progress and barriers to the previous month's goals
- Mid-month: Develop goals for the next month while working on current goals
- End of the month: Focus on the next month's goals to keep the team goal-oriented

Identifying Obstacles

Management meetings are also opportunities to identify obstacles to achieving goals. The team reallocates resources or develops alternative methods to overcome these obstacles. The project manager encourages finding solutions and avoids blaming individuals.

Leadership Meetings

Leadership meetings are held less frequently and are longer. These meetings allow the project manager to reflect on the project, explore larger issues, and step back from day-to-day problem-solving. The focus is on the people aspects of the project, such as relationships with clients, vendors, and the project team.

Purpose of Leadership Meetings

Leadership meetings create a safe environment for sharing thoughts and evaluations on less data-oriented issues. These meetings are more creative and focus on the project's mission and culture. Discussions may also include perceptions from upper management and the community.

Meeting Atmosphere

The project manager's skill in managing meetings includes creating the right atmosphere for each type of discussion. Action item meetings are used for data and fact-based discussions. For creative and open-ended discussions, leadership meetings are appropriate. Mixing meeting purposes can make it difficult to maintain the right kind of conversation.

Other types of project meetings include problem-solving, vendor evaluation, and scheduling meetings. Understanding the different types of meetings and creating the right focus for each is a critical project management skill.

2.5. Virtual PM

Managing a team of people who work side-by-side in the same office is difficult enough. But what about managing a **virtual team** – that is, a team whose members are dispersed across geographical locations? In the worldwide marketplace, such teams are essential. Deborah L. Duarte and Nancy Tennant Snyder explain the trend in their helpful workbook, Mastering Virtual Teams:

> Understanding how to work in or lead a virtual team is now a fundamental requirement for people in many organizations.... The fact is that leading a virtual team is not like leading a traditional team. People who lead and work on virtual teams need to have special skills, including an understanding of human dynamics and performance without the benefit of normal social cues, knowledge of how to manage across functional areas and national cultures, skill in managing their careers and others without the benefit of face-to-face interactions, and the ability to use leverage and electronic communication technology as their primary means of communicating and collaborating. (Duarte & Tennant Snyder, 2006, p. 4)

When properly managed, collaboration over large distances can generate serious advantages. For one thing, the diversity of team members, as per Siebdrat et al. (2009), "exposes members to heterogeneous sources of work experience, feedback, and networking opportunities." At the same time, the team's diversity enhances the "overall problem-solving capacity of the group by bringing more vantage points to bear on a particular project" (Siebdrat et al., 2009, p. 65). Often, engaging with stakeholders via email allows for more intimacy and understanding than face-to-face conversations, which can sometimes be awkward or ineffective, depending on the personality types involved.

However, research consistently underscores the difficulties in effectively getting a dispersed team to work. In a widely cited study of 70 virtual teams, Vijay Govindarajan and Anil K. Gupta (2001) found that "only 18% considered their performance 'highly successful' and the remaining 82% fell short of their intended goals. In fact, fully one-third of the teams ... rated their performance as largely unsuccessful". Furthermore, research has consistently shown that virtual team members are "overwhelmingly unsatisfied" with the technology available for virtual communication and do not view it "as an adequate substitute for face-to-face communication" (Purvanova, 2014).

Given these challenges, what's a virtual team manager to do? It helps to be realistic about the barriers to collaboration that arise when your team is scattered around the office park or around the globe.

The Perils of Virtual Distance

Physical distance—the actual space between team members—can impose all sorts of difficulties. Most studies have shown that teams that are located in the same space, where members can build personal, collaborative relationships with one another, are usually more effective than teams that are dispersed across multiple geographical locations.

> Potential issues include difficulties in communication and coordination, reduced trust, and an increased inability to establish a common ground.... Distance also brings with it other issues, such as team members having to negotiate multiple time zones and requiring them to reorganize their work days to accommodate others' schedules. In such situations, frustration and confusion can ensue, especially if coworkers are regularly unavailable for discussion or clarification of task-related issues. (Siebdrat, et. al., 2009, p. 64)

Even dispersing teams on multiple floors of the same building can decrease the team's overall effectiveness, in part because team members "underestimate the barriers to collaboration deriving from, for instance, having to climb a flight of stairs to meet a teammate face-to-face." Team members end up behaving as if they were scattered across the globe. As one team leader at a software company noted, teams spread out within the same building tend to "use electronic communication technologies such as e-mail, telephone, and voicemail just as much as globally dispersed teams do" (Siebdrat, et. al., 2009, p. 64).

Communication options like video conferences, text messages, and email can do wonders to bridge the gap. But you do need to make sure your communication technology is working seamlessly. Studies show that operational glitches (such as failed Skype connections or thoughtlessly worded emails) can contribute to a pernicious sense of distance between team members. Generally speaking, building a team solely through electronic communication is tough. That's why it's helpful to meet face-to-face occasionally. A visit from a project manager once a year or once a quarter can do wonders to nurture relationships among all team members and keep everyone engaged and focused on project success.

The Special Role of Trust in a Virtual PM

So, what's the secret to making virtual teams work for you? We've already discussed the importance of building trust in any team. However, building trust is a special concern for virtual teams. This is where the Office Administrator's role is key. One of your roles is to distribute communications efficiently so that the entire team is informed about the project's progress.

All sorts of problems can erode a sense of reliability on a virtual team, but most of them come down to a failure to communicate. Sometimes, the problem is an actual, technical inability to communicate (for example, because of unreliable cell phone service at a remote factory); sometimes, the problem is related to scheduling (for example, a manager in Japan being forced to hold phone meetings at midnight with colleagues in North America); and sometimes the problem is simply a failure to understand a message once it is received. Whatever the cause, communication failures have a way of eroding trust among team members as they begin to see each other as unreliable.

As illustrated in Figure 2.1, communicating clearly will lead your team members to perceive you as reliable, encouraging them to trust you.

Figure 2.1 The benefits of clear communication

Leigh Thompson, a professor at Northwestern University's Kellogg School of Management, offers a number of practical suggestions for improving virtual teamwork, including the following:

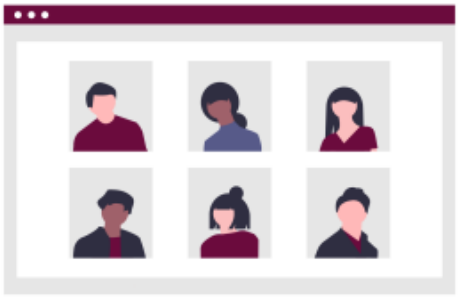
- Verify that your communication technology works reliably and that team members know how to use it.
- Take a few minutes before each virtual meeting to share some personal news so that team members can get to know each other.

- Use video conferencing whenever possible so everyone can see each other. The video image can go a long way toward humanizing your counterparts in distant locales. If video conferencing is not an option, try at least to keep a picture of the person you're talking to visible, perhaps on your computer. Studies have shown that even a thumbnail image can vastly improve your ability to reach an agreement with a remote team member (Thompson, 2015).

2.6 Collaboration Tools

HEATHER BEECROFT

Web Meeting Software



As an executive assistant, you will often be required to organize and coordinate meetings, conferences, and special events. In today's rapidly evolving workplaces, events and meetings are increasingly occurring remotely or "online." "Remote," "virtual," "online," and "web" are often used interchangeably before the word "meeting" to indicate the meeting is occurring with the attendees not all being in the same physical space. Attendees can join the meeting using a phone (tele) or the internet (web) and, for the best experience, use some sort of application or software that allows them to exchange video, on-screen content, and other forms of multimedia.

You will also be responsible for document organization, including paper and electronic versions. In many offices, the days of physical file rooms are obsolete as many businesses are shifting to electronic storage and access to important documents. Understanding how to explore the options and choose a system that is right for your project is important.

Web meeting software is software that allows participants to conduct or attend meetings via the Internet. This can also be known as web conferencing software. People share data and information in real-time without the need to be physically in the same place.

Web meeting software is useful in many ways, some of which are:

- It is convenient and flexible
- It saves time and money
- Increases collaboration and engagement
- It provides multiple ways for individuals to communicate and work together

Common Features

There are a lot of web meeting software options out there, but not all of them are created equally! It is important to compare what features are included when reviewing the different options, as well as whether the options are available free of charge with a basic version or whether users are required to pay for the service.

Depending on what type of software is being used, features may include:

- Screen Sharing
- Sharing of live video/audio using webcams
- Virtual presentation of slideshows and other media items
- Electronic whiteboards
- Instant messaging/chat area
- Live polling/voting

Risks and Security Considerations

Security and risks related to web meeting software are areas that both meeting organizers and attendees often overlook. Recent world events have highlighted the importance of security when conducting meetings. The article, Video conferencing risks when working at home: 16 ways to avoid them outlines the common risks and threats related to web conferencing software.

Security Best Practices

The article below outlines some best practices when using web meeting software.

Do's and don'ts of videoconferencing security

File Sharing Applications

File-sharing applications are tools that allow files to be created, edited, and stored online. Files can be accessed from any device or computer with an internet connection, uploaded to a shared storage space, and accessed by anyone who has a link or password to that space. File-sharing services have evolved into "collaboration platforms," which allow users to do more than just create, edit, and store. With some applications, users can collaboratively edit in real-time, chat while viewing documents, and leave notes and reactions for co-workers.

In the past, you were primarily using FOL to collaborate on project work. Using Groups allowed you to have your own private group discussion board and locker. Your locker allowed you to store shared documents and leave notes for each member of the group.

File-sharing applications are useful in many ways, some of which are:

- It is convenient and flexible
- It saves time and money
- Increases collaboration and engagement
- It provides multiple ways for individuals to communicate and work together

Common Features

There are a lot of file-sharing options out there, but not all of them are created equally. It is important to compare what features are included when reviewing the different options as well as whether the options come free with a basic version or whether users are required to pay for them.

Consider where you save your files currently; are you using OneDrive? Your desktop? A pile on the side of your desk? How does that storage method compare with others in your office?

Risks and Security Considerations

There are plenty of concerns regarding security and risks related to creating and storing documents and information online. A quick internet search can provide endless "horror stories" of data breaches and hackers

gaining access to sensitive information. It is important to be aware of the risks and to ensure you always take steps to protect your information online.

Security Best Practices

This article from Digital Guardian outlines the common risks and threats related to file-sharing applications.
The article: how to stay safe when file sharing online outlines some great best practices when using file-sharing applications.

And now some specifics about the Microsoft Suite of file sharing and collaboration tools. Because our program has focused on using the Microsoft Suite over the years, we're going to be utilizing those tools for the entirety of this course. Watch the video below for a summary of the collaboration with Microsoft.

Video: "Best practices for collaborating in Microsoft 365" by Microsoft 365 help for small businesses [3:23] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

And this one, which is specific to Microsoft OneNote. So that all team members and your professor have access to materials for the Conference Project, you'll be working in Microsoft OneNote for this course.

Video: "OneNote Tutorial for Beginners" by Kevin Stratvert [18:02] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Additional Resources

Video: "How to Be a Virtual Meeting Hero" by Stanford Graduate School of Business [12:04] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

"Confernece Call" by Undraw, Undraw License

2.7. Key Terms

Key Terms

- **Action item meetings** are short meetings to develop a common understanding of what the short-term priorities are for the project, individual roles, and expectations for specific activities.
- **Contract** is a legal agreement that includes penalties for failure to achieve the goals set within.
- **Cross-functional teams** address issues and work processes that include two or more of the functional teams.
- **File sharing applications** are tools that allow files to be created, edited, and stored online.
- **Functional team** refers to the team approach related to the project functions.
- **Leadership meetings** are used by the project manager to reflect on the project, explore the larger issues of the project, and back away from the day-to-day problem-solving.
- **Management meetings** are longer and are focused on planning.
- **Problem-solving teams** are assigned to address specific issues that arise during the life of the project.
- **Project culture** represents the shared norms, beliefs, values, and assumptions of the project team.
- **Team** is a collaboration of people working toward a shared goal.
- **Virtual team** is a team whose members are dispersed geographically.
- **Web meeting software** is software that allows participants to conduct or attend meetings via the internet.

2.8. What's my Role?

The Administrative Professional's Role

As an administrative professional, you are often the link that keeps a project team connected. Your ability to communicate clearly, share information efficiently, and support collaboration tools makes you an essential part of any project's success. Whether you are scheduling meetings, managing shared documents, or ensuring that team members have the resources they need, your role helps create a smooth and organized workflow.

Understanding how teams collaborate will help you anticipate challenges and find ways to keep things running efficiently. You may be responsible for setting up and maintaining tools like shared calendars, cloud-based document storage, or messaging platforms. Learning how to use these tools effectively – and helping others do the same – can make teamwork easier and prevent miscommunication.

Strong collaboration doesn't just happen; it requires effort and coordination. By staying organized, being proactive in sharing information, and ensuring that everyone has access to the right tools, you help create a productive and supportive team environment.

Practical Tips

- **Choose the right collaboration tool for your team** – This may take a little research. Review what is available and provide the Project Manager with options to choose from. It may be necessary for you to set up training sessions for team members who are unfamiliar with the chosen tool.
- **Standardize communication channels –** Make sure that each team member is aware of which collaboration tool has been chosen for the project. For example – the team uses email for formal communication, PM software for task tracking, and messaging tools for quick check-ins and questions that don't require detailed answers.
- **Maintain shared documents effectively** – Set up filing systems using the chosen collaboration tool and develop naming conventions (for shared files and folders) that are simple and logical so that everyone on the team can use them efficiently.

CHAPTER 3 - PROJECT MANAGEMENT - THE INITIATION AND PLANNING PHASES

Chapter Overview

3.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Discuss SMART criteria for developing and defining projects.
- Describe the elements of a project charter and explain its role in the initiation phase.
- Explain issues related to the project scope, such as scope creep.
- Define terms related to scheduling.
- Identify the difference between a deliverable and a work package.
- Describe the WBS numbering system.
- Explain basic concepts related to budgeting.

3.2. Initiation Phase

Project management has a dual nature; it is both a series of distinct phases with a clear beginning and end and a continuous, circular process in which each end leads to a new beginning. Throughout a project, a successful project manager strives to anticipate changing conditions rather than simply responding to them as they arise.

Let's start with the more traditional view, which describes project management as a series of sequential phases, with project initiation coming right after project selection. You can think of these phases, shown in Figure 3.1, as the particle nature of project management.

However, while project initiation marks the official beginning of a project, doing it well also requires looking past the making stage to the entire life cycle of the project's end result. You can think of this as the wave nature of project management.

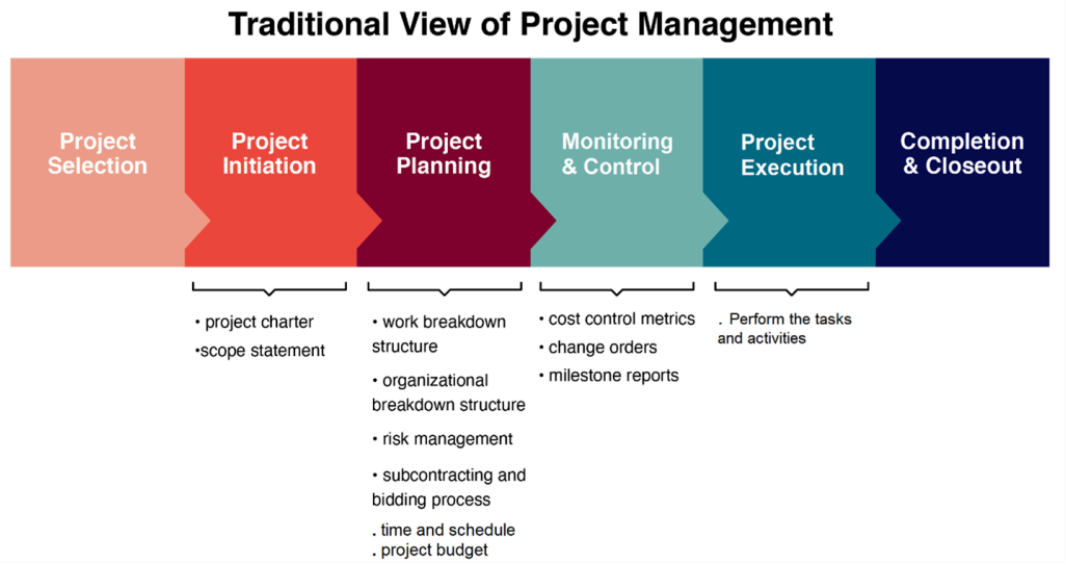


Figure 3.1: Project phases

3.3. Strategic Alignment

The project initiation phase is the first phase within the project management life cycle, as it involves starting up a new project. Within the initiation phase, the business problem or opportunity is identified, a solution is defined, a project is formed, and a project team is appointed to build and deliver the solution to the customer. A **business case/proposal** (sometimes called a feasibility study) is created to define the problem or opportunity in detail and identify a preferred solution for implementation. The business case/proposal includes:

- A detailed description of the problem or opportunity with headings such as Introduction, Business Objectives, Problem/Opportunity Statement, Assumptions, and Constraints
- A list of the alternative solutions available
- An analysis of the business benefits, costs, risks, and issues
- A description of the preferred solution
- Main project requirements
- A summarized plan for implementation that includes a schedule and financial analysis

SMART Project Objectives

In the early 1980s, George T. Doran introduced the SMART set of criteria for projects, goals and objectives. **SMART** is an acronym for Specific, Measurable, Assignable, Realistic, and Time-Related. The smart criteria have been applied in many different areas of management, including project management. Let's take a look at each of Doran's criteria as they apply to project management.

Specific – A project needs to be specific about what it will accomplish. Unlike many organizational goals, the goal of a project should not be vague or nebulous. An organization may want to "make London, Ontario, a great place to live," but its projects need to focus on a specific goal. For example, a more specific goal would be to build a downtown farmers' market. A project that is specific is one that can be clearly communicated to all team members and stakeholders.

Measurable – How will we track the project's progress and success? What measurable changes will we see once the project is completed? These measures should be quantifiable, meaning we can count or measure them.

Assignable – Who will be responsible for the work? Do we have people in our organization with the right skills, or do we need to hire external experts?

Realistic – Can our organization realistically achieve this project with the talents and resources we have? This is crucial for businesses of all sizes. For example, while it might be exciting to open a new branch of our company, is it realistic to do so given our current resources?

Time-related – When will the project be completed, and how long will it take? These criteria are very useful when defining a project. If a project description doesn't meet all these criteria, it's time to reassess and ensure it's truly a project and not a broader program or strategic goal.

Practice

Text Description

Let's apply the SMART objectives to our Sunny Horizons, Inc. expansion project. Fill in the blanks below to indicate how each criterion is met based on the information in the case study provided earlier in this text.

- Specific
- Measurable
- Assignable
- Realistic
- Time-Related

Do you have any questions for the project team after determining the criteria above?

3.4. Project Charter

What is the Project Charter?

A **project charter**, project definition, or project statement is a statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference of authority for the future of the project.

The charter document can be just a couple of pages in length or can be 50-100 pages. Ideally, it will be short (less than 5 pages) and written in clear and concise language so that anyone who reads it will have a clear understanding of the project, regardless of their technical background. Most project charters include a place at the end of the document for approval and sign-off by the project sponsors or customers (i.e., those people who are paying for the project).

Purpose of the Project Charter

The project charter is used by the project manager during the planning process. The project charter informs the project manager about what skills will be required on the project team, as well as the general scope of work for the project. Some organizations forgo the creation of a project charter, viewing it as a document that merely takes time to create and contains information that "everyone already knows." This can be a big mistake. The charter can be referenced by the project manager and stakeholders if some of the goals of the project are not met or they are asked to do something outside the scope of the project. A well-drafted project charter can prevent political interference in achieving the goals of the project and reduce scope creep.

In summary, the purpose of a project charter is to:

- Provide an understanding of the project, the reason it is being conducted, and its justification.
- Establish the general scope of the project early on.
- Establish the project manager and his or her authority level. A note of who will review and approve the project charter must be included.

What Should Be in the Project Charter?

There are many templates available for project charters, and these vary greatly in content and level of detail. (The PMI-affiliated website ProjectManagement.com offers a number of project charter templates) At a minimum, good project charters will contain the following sections.

Background

The background should provide a broad overview of the project and answer the following questions:

- What is the purpose of the project?
- Where did the project originate? Have we conducted similar projects in the past?
- Who is the project manager, and what level of authority does the project manager have?

Business Case

The Business Case describes why this project was selected over others and answers the following questions:

- Why was this project selected to move forward (project justification)? What selection criteria were used? (Project selection techniques are covered in a later chapter.)
- What problems is this project solving or what opportunities is it creating? What are the high-level requirements?

Goals

Listing the goals for the project ensures that the stakeholders will not be disappointed when the project is completed. This section should answer the following questions:

- What are the broad goals of this project?
- How will we know if the project is a success (what are our metrics for success)?
- Are there industry standards that we are trying to meet or benchmarks for performance that we want this project to attain?

Key Stakeholders

This section describes the key stakeholders and their interest in the project. This doesn't have to be an exhaustive list of stakeholders; it should contain a list of people who are interested in the project as well as people who will pay for or benefit from the project.

Deliverables

A project is said to have deliverables as products or services. They are things such as physical objects, software code, or events that make up the project, and they are written in the form of nouns, for example, floor, walls, electrical...etc.

Major Milestones/Timeline

This section provides a summary of the major milestones for the project. A listing of any hard deadlines for the project should be included. Milestones can relate to project work (when are major deliverables expected to be complete?) as well as invoicing and payment deadlines.

Project Budget

The project budget section should provide a summary of the budget for the project and information about how it was determined. It answers the following questions:

- What is the initial budget for this project?
- How was that budget developed?
- Are the numbers used for budgeting rough estimates based on top-down estimation techniques, such as analogous or parametric estimating, or are they hard constraints?
- What contingency funds have been allocated?

3.5. Project Scope

As an Office Administrator, it's important to know exactly what work needs to be done before starting a project. You have a team, and you need to understand what each member will do to meet the project's goals. The first step is scope planning, which involves defining all the work needed to successfully complete the project. It's crucial to have a clear picture of all tasks and keep this scope updated in the project's scope management plan.

Defining the Scope

We need to refine the project's objectives and list all the deliverables our team will produce. Deliverables are everything our project will deliver, including products, services, documents, plans, schedules, budgets, and blueprints. These deliverables are tangible outcomes or specific items that must be produced to consider the project or a project phase complete. Intermediate deliverables, like objectives, must be specific and verifiable. All deliverables must be described in detail to differentiate them from related deliverables. For example:

- A twin-engine plane versus a single-engine plane
- A red marker versus a green marker
- A daily report versus a weekly report
- A departmental solution versus an enterprise solution

One of our main tasks is to document the project's deliverables accurately and manage the project to produce them according to agreed criteria.

Project Requirements

After all the deliverables are identified, the project manager needs to document all the requirements of the project. Requirements describe the characteristics of the final deliverable, whether it is a product or a service. They describe the required functionality that the final deliverable must have or specific conditions the final deliverable must meet in order to satisfy the objectives of the project. A requirement is an objective that must be met. The project's requirements, defined in the scope plan, describe what a project is supposed to accomplish and how the project is supposed to be created and implemented. Requirements answer the following questions regarding the as-is and to-be states of the business: who, what, where, when, how much, and how does a business process work?

Requirements may include attributes such as dimensions, ease of use, colour, and specific ingredients. The requirements for that deliverable may include carton design, photographs that will appear on the carton, and colour choices.

Requirements specify what the final project deliverable should look like and what it should do. Requirements must be measurable, testable, related to identified business needs or opportunities, and defined to a level of

detail sufficient for system design. They can be divided into six basic categories: functional, non-functional, technical, business, user, and regulatory requirements.

Functional Requirements

Functional requirements describe the characteristics of the final deliverable in ordinary non-technical language. They should be understandable to the customers, and the customers should play a direct role in their development. Functional requirements are what you want the deliverable to do.

- Vehicle: “The vehicles should be able to carry up to a one-ton load from a warehouse to a shop.”
- Computer System: “The system should store all details of a customer’s order.”

The important point to note is that what is wanted is specified and not how it will be delivered.

Non-functional Requirements

Non-functional requirements specify criteria that can be used to judge the final product or service that your project delivers. There are restrictions or constraints to be placed on the deliverable and how to build it. Their purpose is to restrict the number of solutions that will meet a set of requirements. Using the vehicle example, the functional requirement is for a vehicle to take a load from a warehouse to a shop. Without any constraints, the solutions being offered might result in anything from a small to a large truck. Non-functional requirements can be split into two types: performance and development. To restrict the types of solutions, you might include these performance constraints:

- The purchased trucks should be Canadian-made due to government incentives.
- The load area must be covered.
- The load area must have a height of at least 10 feet.

As mentioned earlier, projects have constraints that can be categorized according to the type of requirements. There are three general types of non-functional development constraints:

- *Time***:** When a deliverable should be delivered
- *Cost:* How much money is available to develop the deliverable
- *Quality***:** Any standards that are used to develop the deliverable, development methods, etc.

Technical Requirements

Technical requirements emerge from the functional requirements to answer the following questions: How will the problem be solved this time, and will it be solved technologically and/or procedurally? They specify how the system needs to be designed and implemented to provide the required functionality and fulfill the required operational characteristics.

For example, in a software project, the functional requirements may stipulate that a database system will be developed to allow access to financial data through a remote terminal. The corresponding technical requirements would spell out the required data elements, the language in which the database management system will be written (due to existing knowledge in-house), the hardware on which the system will run (due to existing infrastructure), telecommunication protocols that should be used, and so forth.

Business Requirements

Business requirements are the needs of the sponsoring organization, always from a management perspective. Business requirements are statements of the business rationale for the project. They are usually expressed in broad outcomes, satisfying the business needs rather than specific functions the system must perform. These requirements grow out of the vision for the product that, in turn, is driven by mission (or business) goals and objectives.

User Requirements

User requirements describe what the users need to do with the system or product. The focus is on the user experience with the system under all scenarios. These requirements are the input for the next development phases: user-interface design and system test cases design.

Regulatory Requirements

Regulatory requirements can be internal or external and are usually non-negotiable. They are the restrictions, licenses, and laws applicable to a product or business that are imposed by the government.

Requirements Traceability Matrix

The requirements traceability matrix is a table that links requirements to their origin and traces them throughout the project life cycle. The implementation of a requirements traceability matrix helps ensure that each requirement adds business value by linking it to the business and project objectives. It provides a means to track requirements throughout the project life cycle, helping to ensure that requirements approved in the requirements documentation are delivered at the end of the project. Finally, it provides a structure for managing changes to the product scope. This process includes, but is not limited to, tracking:

- Requirements for business needs, opportunities, goals, and objectives
- Requirements for project objectives
- Requirements for project scope/work breakdown structure deliverables
- Requirements for product design
- Requirements for product development
- Requirements for test strategy and test scenarios
- High-level requirements to more detailed requirements

Attributes associated with each requirement can be recorded in the requirements traceability matrix. These attributes help to define key information about the requirement. Typical attributes used in the requirements traceability matrix may include a unique identifier, a textual description of the requirement, the rationale for inclusion, owner, source, priority, version, current status (such as active, cancelled, deferred, added, approved), and date completed. Additional attributes to ensure that the requirement has met stakeholders' satisfaction may include stability, complexity, and acceptance criteria.

“Contract” by Undraw, Undraw License

3.6. Managing the Scope

Time, cost, and scope are the triple constraints of project management. Changing one affects the others. For example, if a project takes longer, costs will likely increase. If costs are cut, it might slow down work and affect the project's scope and quality.

In the early stages, it's important to think about the project's scope, which is all the work needed to deliver the product or service. As the project progresses, the scope may evolve based on new information and stakeholder needs. This is called **scope evolution** and involves agreed changes to the project scope, budget, and schedule.

Scope creep, on the other hand, is unmanaged change. It happens when uncontrolled changes are made to the project scope, leading to overruns in time, money, and resources.

Creating a Clear Scope Statement

A clear **scope statement,** the document that defines the project's scope, is key to managing scope. It should be precise about what the project aims to achieve. A vague scope can lead to changes that alter the original project.

The scope statement should include:

- Justification of the project's purpose and business needs
- Explanation of the project's goals, deliverables, budget, and constraints
- Acceptance criteria for the deliverables
- Explanation of what is excluded from the project
- Assumptions about the project
- Any new or unusual technology to be used

3.7. Managing the Schedule

The Gantt Chart

A **Gantt chart** is a type of bar chart developed by Henry Gantt that illustrates a project schedule. Gantt charts are easy to read and are commonly used to display scheduled activities. These charts display the start and finish dates of the terminal elements and summary elements of a project. Terminal elements and summary elements comprise the work breakdown structure of the project. Some Gantt charts also show the dependency relationships (i.e., precedence network) between activities.

Gantt charts show all the key stages of a project and their duration as a bar chart, with the time scale across the top. The key stages are placed on the bar chart in sequence, starting in the top left corner and ending in the bottom right corner (Figure 3.2). A Gantt chart can be drawn quickly and easily and is often the first tool a project manager uses to provide a rough estimate of the time that it will take to complete the key tasks. Sometimes, it is useful to start with the target deadline for completion of the whole project because it is soon apparent if the time scale is too short or unnecessarily long. Thus, the detailed Gantt chart is usually constructed after the main objectives have been determined.

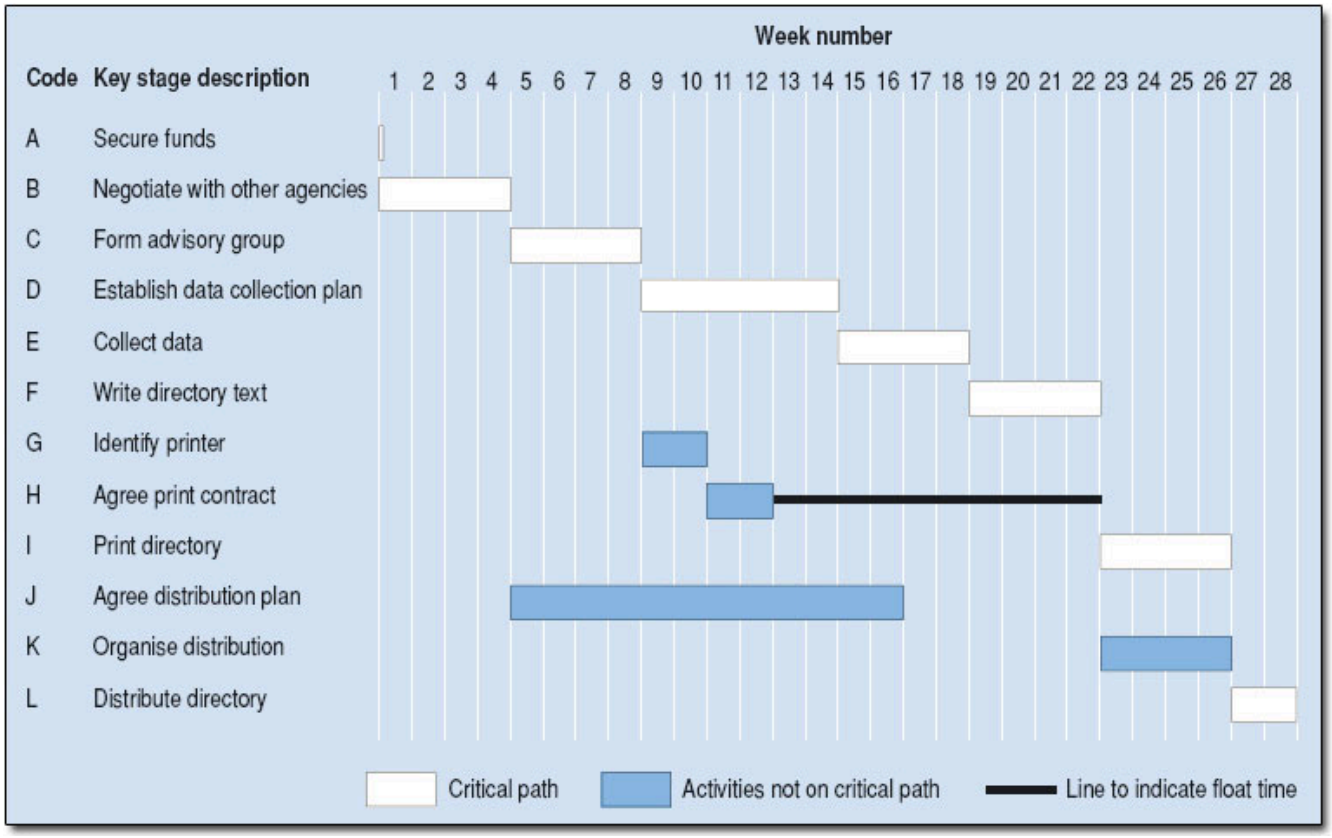


Figure 3.2: Gantt chart for directory production.

Milestones

As an Office Administrator, it's helpful to understand the concept of project milestones. **Milestones** are key

points in a project that help you stay on track and measure progress. They serve as high-level guides and are useful for communicating with stakeholders.

What are Milestones?

Milestones mark significant points in a project, such as:

- The start of important phases of work
- The end of important phases of work
- Deadlines for specific tasks
- Important decision points

Using Milestones

Milestones help you focus on the big picture and avoid getting lost in details. You can use pull planning to identify milestones and the critical path to ensure they are achievable. This helps you stay realistic about your project's timeline.

Communication Tool

Milestones are especially useful for communicating the project's health to stakeholders. A project schedule that includes only milestones gives a quick overview of where things stand. Reporting on milestones in the project's dashboard provides an at-a-glance update for everyone involved.

3.8. Planning Phase

After the project has been defined and the project team has been appointed, you are ready to enter the second phase in the project management life cycle: the detailed *project planning* phase.

Project planning is at the heart of the project life cycle and tells everyone involved where you're going and how you're going to get there. The **planning phase** is when the project plans are documented, the project deliverables and requirements are defined, and the project schedule is created. It involves creating a set of plans to help guide your team through the implementation and closure phases of the project. The plans created during this phase will help you manage time, cost, quality, changes, risk, and related issues. They will also help you control staff and external suppliers to ensure that you deliver the project on time, within budget and schedule.

The project planning phase is often the most challenging phase for a project manager, as they need to make an educated guess about the staff, resources, and equipment needed to complete your project. The purpose of the project planning phase is to:

- Establish business requirements
- Establish cost, schedule, list of deliverables, and delivery dates
- Establish resources plans
- Obtain management approval and proceed to the next phase

Merriam-Webster's definition of **planning** is "the act or process of making a plan to achieve or do something." This suggests that the ultimate goal of planning is the plan itself. It also presumes that once a plan has been formulated, you only need to follow the plan to achieve the desired outcome. That's fine for ordinary conversation. But when we begin to think about living order project planning, a more expansive understanding of the nature of planning emerges. In living order, planning is a process that prepares the project team to respond to events as they actually unfold. The whole point of planning is to develop strategies to manage the:

- Changes to scope
- Schedule
- Cost
- Quality
- Resources
- Communication
- Risk
- Procurement
- Stakeholder engagement

A plan is a strategic framework for the scheduling and execution of a project. It's only useful if it includes the

information team members require to begin moving forward. And it only remains useful if team members modify the plan as they learn the following about the project:

- Key constraints such as the timeline, cost, and functional requirements.
- Information on project system issues, such as workflow and milestones, provides a broad look at the project as a whole.
- Plans for periodic check-ins that allow participants and leadership to re-evaluate the project and its original assumptions

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3.9. Scheduling Terms

Making sure all stakeholders use the same terminology is crucial in all phases of project management, but it's especially important when you are trying to get a group of diverse people to agree to a schedule. After all, a schedule only works as a form of communication if it is written in a language everyone understands. And since contract terms are often tied to a schedule, a lack of common agreement on the meaning of specific terms in a schedule can have far-ranging effects.

Terminology is so important that many state governments around the United States publish their own project management glossaries. As you embark on a new project, you'd be wise to find out if the organization you work for or the vendors you will be working with have compiled such a glossary. If such organizational resources exist, use them as a starting point for your own project glossary. Otherwise, you can always turn to the Project Management Institute's lexicon (available here: "PMI Lexicon of Project Management Terms") or glossaries provided online by consulting firms or other project management resources.

The following definitions (see activity below) of scheduling-related terms are taken from a variety of sources.

Let's Review

Text Description
This activity contains a set of dialog cards, which are described below.
Activity Description or Instruction: Flip the cards to see the terms that relate to the given definition.

1. Dialog Text: An element of work performed during the course of a project. An activity normally has an expected duration, an expected cost, and expected resource requirements. Solution: Activity
2. Dialog Text: An expenditure, usually of money, for purchasing goods or services. Solution: Cost
3. Dialog Text: Any personnel, material, or equipment required for the performance of an activity. Solution: Resource
4. Dialog Text: Calculated time span during which an event has to occur within the logical and imposed constraints of the network, without affecting the total project duration. Solution: Slack
5. Dialog Text: A significant event in the project; usually completion of a major deliverable. Solution: Milestone
6. Dialog Text: The amount of time to complete a specific task given other commitments, work, vacations, etc., Usually expressed as workdays or workweeks. Solution: Duration

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3.10. Work Breakdown Structures

As an Office Administrator, it's helpful to have a basic understanding of the Work Breakdown Structure (WBS). The WBS is a hierarchical outline of all the deliverables needed to complete a project. It's one of the first steps in organizing and scheduling project work.

What is a WBS?

The WBS breaks down a project into smaller parts:

- Deliverables: Major items or outcomes of the project.
- Sub-deliverables: Smaller parts of the major deliverables.
- Work Packages: Specific tasks or units of work needed to create the deliverables.

The WBS helps summarize costs and labour for different parts of the project. It also helps decide if some tasks should be outsourced to specialists who can do them more cost-effectively.

Deliverables vs. Work Packages

- **Deliverables**: These are the main outputs of the project, like physical objects, software, or events.
- **Work Packages**: These are the tasks assigned to team members or contractors to create the deliverables. They are action-oriented and described with verbs.

WBS Numbering

Each item in the WBS is numbered to show its relationship to other items. This makes it easy to track the status of deliverables and work packages. For example, "Install Metal Roof" might be numbered 3.2.2, indicating it's part of the third major deliverable (Roof: 3.), the second sub-deliverable (Roof Cover: 3.2.), and the second work package for the roof covering (3.2.2).

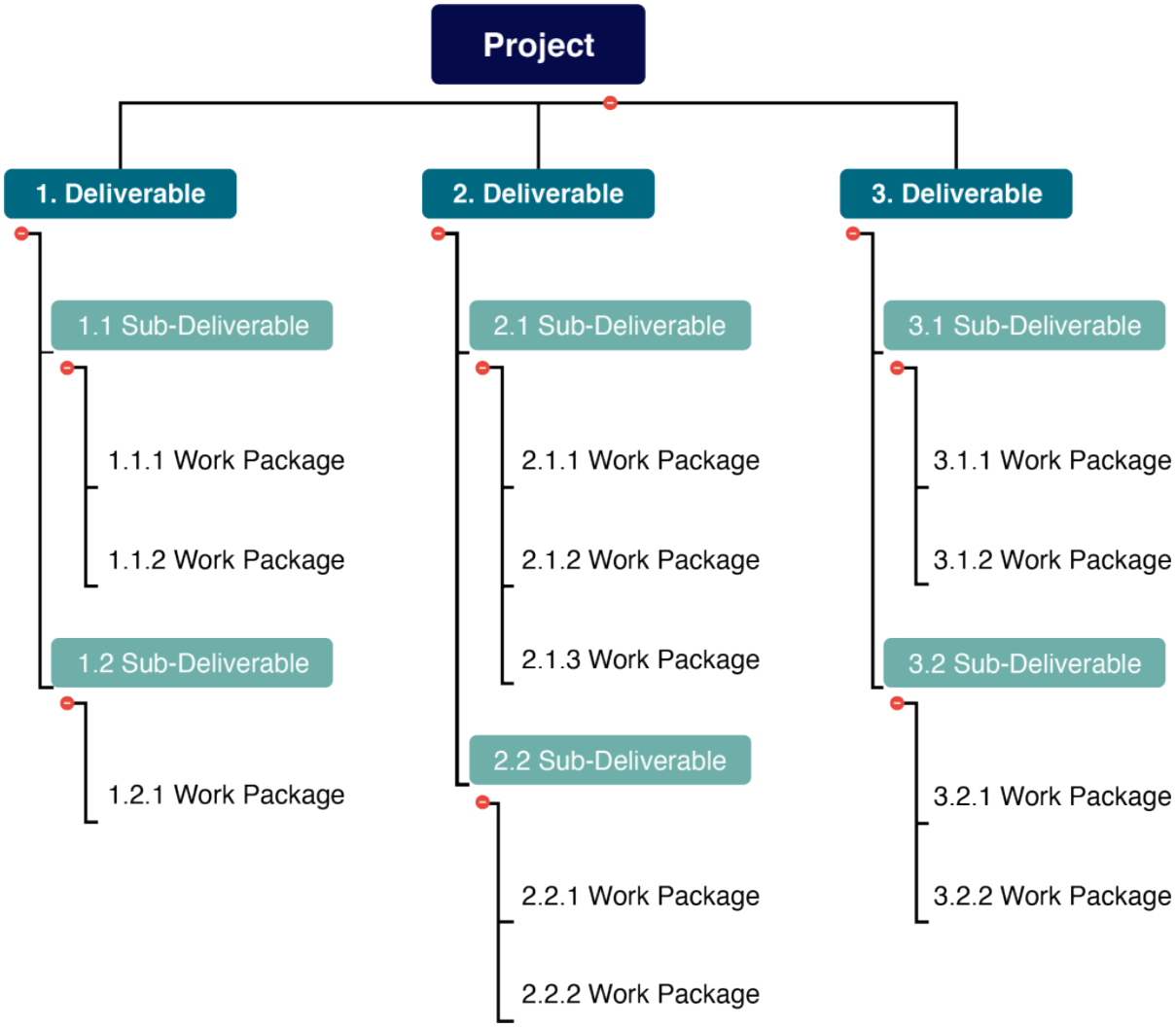


Figure 3.3: The WBS is an outline that shows how the deliverables, sub-deliverables and work packages relate to the final project.

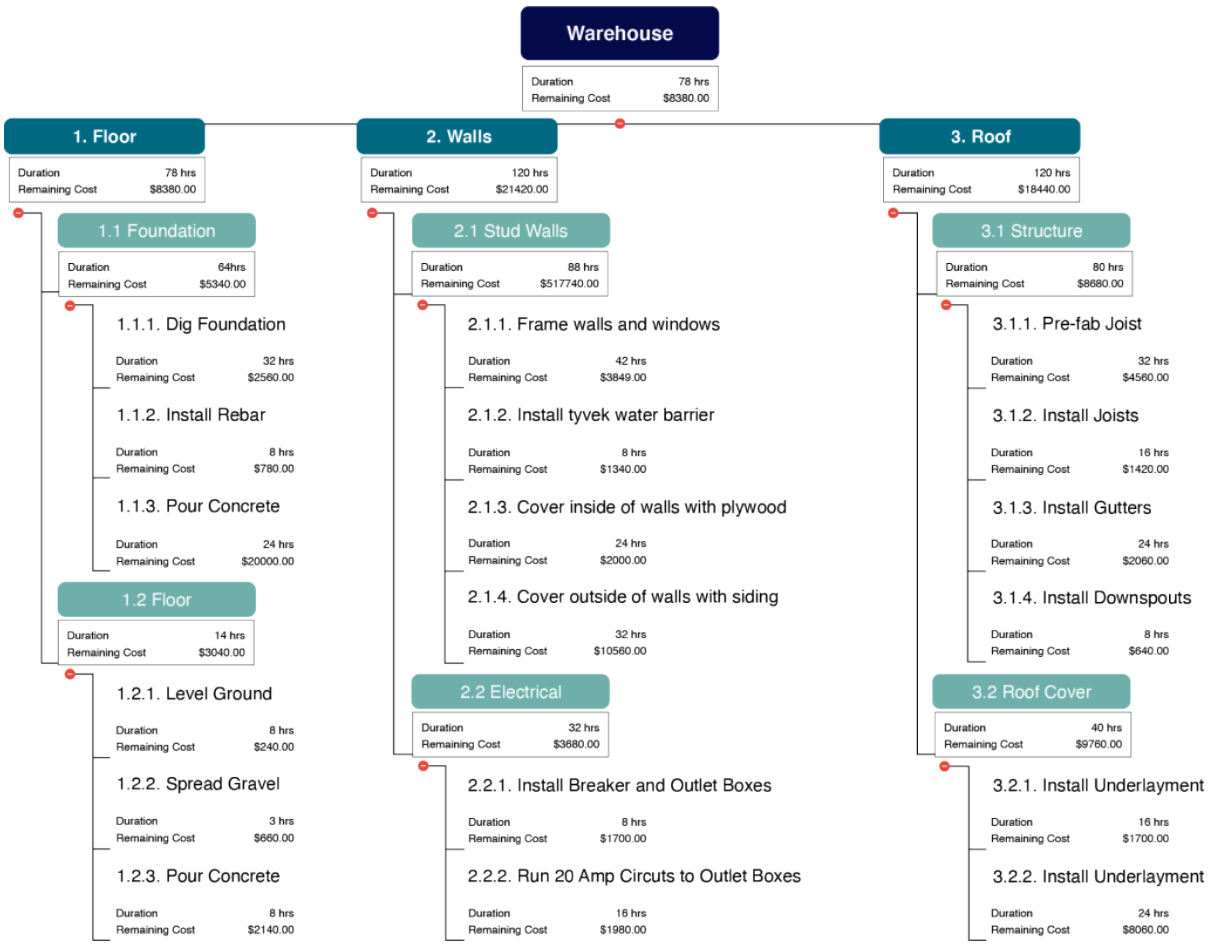


Figure 3.4: WBS for New Warehouse Project

In the example in Figure 3.4, if the project manager can find a roofing contractor that completes the roof in less than 15 days (120 hours) and for less than $18,440, then it would be better to outsource that part of the project.

Note that work packages are independent of each other in a WBS, and do not summarize or include the work from other work packages. Work packages are the lowest level of the WBS.

The WBS Dictionary

The WBS dictionary provides detailed documentation about each work package, including;

- Who is responsible for completing the work package?
- What resources will be needed to complete the work package?
- What deliverable(s) is the work package contributing to?
- What deadlines or milestones are associated with this work package?
- What are the acceptance criteria for this work package?

When the WBS is created, not all of the information about the work packages is known (for example, the estimates for labour and material costs). Remember that the planning process continues throughout the

execution of the project. As a result, the WBS dictionary is a "living document" that will be augmented, edited and updated as the project moves forward. figure 3.5 is an example of a WBS Dictionary entry; note that several items will be added later in the planning process. This is an example of a document you might be responsible for creating and distributing to your project team.

Hammer and Chisel Incorporation WBS Dictionary											
Item Number	Description	Constraints	Responsible	Milestone	Schedule	Resources	Cost	Quality	Acceptance Criteria	References	Guidelines
1.1											
1.1.1											
1.1.2											
1.1.3											

Figure 3.5 Hammer and Chisel Incorporation WBS Dictionary Example.

3.11. Cost Estimation/Budgeting

Ultimately, cost, the number management typically cares about most in a for-profit organization, is determined by the price. For many projects, knowing the exact cost of an endeavour is impossible until it is completed. Stakeholders can agree on the intended *value* of a project at the beginning, and that value has an expected cost associated with it. But you may not be able to pin down the cost more precisely until you've done some work on the project and learned more about it.

To estimate and manage costs effectively, it is important to understand the different types of costs:

- **Direct Costs:** "An expense that can be traced directly to (or identified with) a specific cost centre or cost object such as a department, process, or product" (Business Dictionary, n.d.). Examples of direct costs include labour, materials, and equipment. A direct cost changes proportionately as more work is accomplished.
- **Direct Project Overhead Costs:** Costs that are directly tied to specific resources in the organization that are being used in the project. Examples include the cost of lighting, heating, and cleaning the space where the project team works. Overhead does not vary with project work, so it is often considered a fixed cost.
- **General and Administrative (G&A) Overhead Costs**: The "indirect costs of running a business," such as IT support, accounting, and marketing" (Tracy, n.d., para. 1).

Many contracts include both fixed-price and cost-plus features. For example, they might have a fixed price element for those parts of the contract that have low variability and are under the direct control of the project team (e.g., direct labour) but have variable cost elements for those aspects that have a high degree of uncertainty or are outside the direct control of the project team (e.g., fuel costs or market-driven consumables).

It is important to come up with detailed estimates for all the project costs. Once this is compiled, you add up the cost estimates into a budget plan. It is now possible to track the project according to that budget while the work is ongoing.

Often, when you come into a project, there is already an expectation of how much it will cost or how much time it will take. When you make an estimate early in the project without knowing much about it, that estimate is called a rough order-of-magnitude estimate (or a ballpark estimate). This estimate will become more refined as time goes on and you learn more about the project.

The project team will work through several processes to determine the overall estimate of a project's cost. It will be your job to keep track of all of the documents supporting the estimate. That way, you will be able to support the assumptions made when the team creates their final estimate and develops a budget. We'll learn more about document storage and organization in a later chapter, but knowing now that some of the bigger documents (budget, timeline, etc.) will have smaller supporting documents that need to be stored together will help you as you work to develop a document management system.

Estimating Costs to Compare and Select Projects

As an Office Administrator, it's helpful to understand how project costs are estimated during the selection phase. Economic factors are important when choosing between projects. To compare projects, we need to

estimate their costs accurately enough to make meaningful comparisons. However, the time and resources used for these estimates should match the project's size and complexity.

Estimating Methods

During the selection phase, cost estimates are usually quicker and use fewer resources than detailed estimates made later. These early estimates rely on the expert judgment of experienced managers who can make accurate estimates with less detailed information. They often use information from previous projects, adjusted to match the current project's size and complexity, or standardized formulas.

Analogous Estimate

An **analogous estimate** is based on the costs of similar projects. If a similar project costs a certain amount, it's reasonable to assume the current project will cost about the same. Since no two projects are exactly alike, the estimate must be adjusted for differences in size and complexity. This adjustment is based on the estimator's experience, including lessons learned from past projects.

Example: Analogous Estimate for John's Move

John sold his apartment and purchased another one. It is now time to plan for the move. John asked a friend for advice about the cost of his move. His friend replied, "I moved from an apartment a little smaller than yours last year, and the distance was about the same. I did it with a 14-foot truck. It costs about $575 for the truck rental, pads, hand truck, rope, boxes, and gas." Because of the similarity of the projects, John's initial estimate of the cost of the move was less than $700, so he decided that the cost would be affordable and the project could go forward.

Parametric Estimate

If the project consists of activities that are common to many other projects, average costs are available per unit. For example, if you ask a construction company how much it would cost to build a standard office building, the estimator will ask for the size of the building in square feet and the city in which the building will be built. From these two factors—size and location—the company's estimator can predict the cost of the building. Factors like size and location are parameters—measurable factors that can be used in an equation to calculate a result. The estimator knows the average cost per square foot of a typical office building and adjustments for local labour costs. Other parameters, such as the quality of finishes, are used to refine the estimate further. Estimates that are calculated by multiplying measured parameters by cost-per-unit values are parametric estimates.

Activity-Based Estimates

An activity can have costs from multiple vendors and internal costs for labour and materials. Detailed estimates from all sources can be reorganized so those costs associated with a particular activity can be grouped by adding the activity code to the detailed estimate. The detailed cost estimates can be sorted and then subtotalled by activity to determine the cost for each activity.

Figure 3.6 Detailed Costs Associated With Activities

Category	Description	Activity	Quantity	Unit Price	Cost
Packing Materials	Small Boxes	2.1	10	$1.70	$17.00
Packing Materials	Medium Boxes	2.1	15	$2.35	$35.25
Packing Materials	Large Boxes	2.1	7	$3.00	$21.00
Packing Materials	Extra Large Boxes	2.1	7	$3.75	$26.25
Packing Materials	Short Hanger Boxes	2.1	3	$7.95	$23.85
Packing Materials	Box Tape	2.1	2	$3.85	$7.70
Packing Materials	Markers	2.1	2	$1.50	$3.00
Packing Materials	Mattress/Spring Bags	2.1	2	$2.95	$5.90
Packing Materials	Lift Straps Per Pair	2.1	1	$24.95	$24.95
Packing Materials	Bubble Wrap	2.1	1	$19.95	$19.95
Packing Materials	Furniture Pads	2.1	4	$7.95	$31.80
Packing Materials	Rental	2.1			$400.00
Packing Materials	Gas at 10mpg	2.1	200	$2.25	$45.00

3.12. Key Terms

Key Terms

- **Analogous estimate:** estimate based on costs of similar projects.
- **Business Case/Proposal:** Document created to define the problem or opportunity in detail and identify a preferred solution for implementation, generally created in the Initiation phase.
- **Deliverable:** what is delivered as the finished product of a project – usually a noun
- **Direct Cost:** An expense that can be traced directly to (or identified with) a specific cost center or cost objects such as a department, process, or product.
- **Direct Project Overhead Costs:** Costs that are directly tied to specific resources in the organization that is being used in the project. Examples include the cost of lighting, heating, and cleaning the space where the project team works.
- **Functional Requirements:** The characteristics of the final deliverable in ordinary, non-technical language. What you want the deliverable to do.
- **Gantt Chart:** A type of bar chart that illustrates a project schedule.
- **General and Administrative (G&A) Overhead Costs:** The indirect costs of running a business, such as IT support, accounting, and marketing.
- **Milestones:** another name for deadlines
- **Non-functional Requirements:** Criteria that can be used to judge the final product or services that your project delivers.
- **Planning:** The act or process of making a plan to achieve or do something.
- **Planning Phase:** When the project plans are documented, the project deliverables and requirements are defined, and the project schedule is created. It involves creating a set of plans to help guide your team through the implementation and closure phases of the project.
- **Project Charter:** A statement of the scope, objectives, and participants in a project.
- **Project Management:** Has a dual nature; it is both a series of distinct phases with a clear beginning and end and a continuous, circular process in which each end leads to a new beginning.
- **Scope Creep:** Change in the scope of a project that goes unmanaged. It is common in projects that have lots of stakeholders with differing goals.
- **Scope Evolution:** Changes that all stakeholders agree on and that are accompanied by corresponding changes in budget and schedule. It is a natural result of the kind of learning that goes on as a project unfolds.
- **Scope Statement:** Document that defines the project's scope. It is generally developed during the Initiation phase.
- **SMART:** Acronym for Specific, Measurable, Assignable, Realistic, and Time-Related. This is typically used to describe criteria for setting attainable goals in a project.
- **Work Breakdown Structure (WBS):** Hierarchical outline of all the deliverables involved in completing a project. The WBS is part of a project scope statement. The creation of a WBS is one

of the first steps in organizing and scheduling the work for a project.

- **Work Packages**: tasks assigned to team members or contractors to create the deliverables. They are action-oriented and described with verbs.

3.13. What's my Role?

The Administrative Professional's Role

During the Initiation and Planning phases of a project, the administrative professional plays a key role in helping the team get organized and ready to begin. You may be asked to help set up early meetings, gather background information, or prepare documents that help the team define the project's goals. By keeping track of details and making sure information is easy to access, you help the team start strong and stay focused.

In the Planning phase, your support becomes even more important. You might assist in creating timelines, building contact lists, or organizing shared folders. You could also be responsible for keeping early drafts of the project plan organized and updated. By staying alert to changes and being clear in your communication, you help the project stay on schedule and aligned with its goals.

Your strong organizational and communication skills make you a valuable part of the team during these early stages. By helping the team set a clear path forward, you lay the groundwork for a successful project.

Practical Tips

- **Engage all stakeholders**: Your goal is to keep people meaningfully engaged in your project. You don't want stakeholders showing up for ceremonial appearances at project meetings. Instead, you want them seriously focused on the prospects for project success.
- **Create a glossary of terms**: Consider creating a glossary of terms on projects with a lot of complex jargon. Then, publish it in a way that makes it accessible to all stakeholders, updating it as needed.
- **Post the project documents prominently**: Putting important documents front and centre helps a team stay focused, especially if you have everyone sign them first. It also encourages the team to update them when necessary.
- **Plan for errors**: You and your team will almost certainly make mistakes, especially in the early stages of a project. Therefore, you should plan for that. Keep thinking ahead to what might go wrong, and how you could correct course.

CHAPTER 4 - COMMUNICATIONS AND ONBOARDING

Chapter Overview

4.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Identify types of communications.
- Recognize the importance of the level of detail in communication for project success.
- Describe the role of communication as it relates to the office administrator.
- Describe the difference between onboarding and offboarding.
- Provide some ideas for welcoming new team members.
- Identify what documents could be part of a project toolkit.

4.2. Role of Communication in PM

Communications management is about keeping everybody in the loop. The communications planning process concerns defining the types of information you will deliver, who will receive it, the format for communicating it, and the timing of its release and distribution. It turns out that 90% of a project manager's job is spent on communication, so it's important to make sure everybody gets the right message at the right time.

The first step in defining your communication plan is figuring out what kind of communication your stakeholders need from the project so they can make good decisions. This is called the **communications requirements analysis.** Your project will produce a lot of information; you don't want to overwhelm your stakeholders with all of it. Your job is to figure out what they feel is valuable. Furthermore, communicating valuable information doesn't mean you always paint a rosy picture.

Communications to stakeholders may consist of either good news or bad news. The point is that you don't want to bury stakeholders in too much information, but you do want to give them enough so that they're informed and can make appropriate decisions.

Communications technology has a major impact on how you keep people in the loop. Methods of communicating can take many forms, such as written reports, conversations, emails, formal status reports, meetings, online databases, online schedules, and project websites. You should consider several factors before deciding what methods you'll choose to transfer information. The timing of the information exchange or the need for updates is the first factor. Do you need to procure new technology or systems, or are there systems already in place that will work? The technologies available to you should figure into your plan of how you will keep everyone notified of project status and issues. Staff experience with the technology is another factor. Are there project team members and stakeholders who are experienced in using this technology, or will you need to train them?

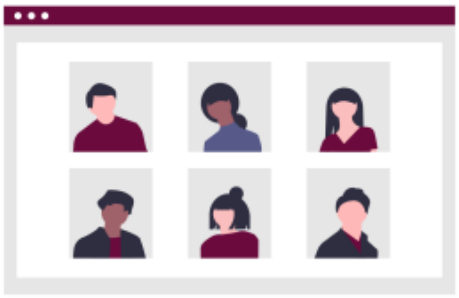
Finally, consider the duration of the project and the project environment. Will the technology you're choosing work throughout the life of the project, or will it have to be upgraded or updated at some point? And how does the project team function? Are they located together or spread out across several campuses or locations? The answers to these questions should be documented in the communication plan.

All projects require a sound communication plan, but not all projects will have the same types of communication or the same methods for distributing the information. The communication plan documents the types of information needs the stakeholders have, when the information should be distributed, and how the information will be delivered.

The types of information you will communicate typically include project status, project scope statements and updates, project baseline information, risks, action items, performance measures, project acceptance, and so on. It's important that the information needs of the stakeholders be determined as early in the planning phase of the project management life cycle as possible so that as you and your team develop project planning documents, you already know who should receive copies of them and how they should be delivered.

4.3. Types of Communication

Completing a complex project successfully requires good communication among team members. If those team members work in the same building, they can arrange regular meetings, simply stop by each other's office space to get a quick answer, or even discuss a project informally at other office functions. Many projects are performed by teams that interact primarily through electronic communication and are, therefore, called virtual teams. To avoid miscommunication that can harm trust and to include team members in a project culture, the project team needs a plan for communicating reliably and in a timely manner. This planning begins with understanding two major categories of communication: synchronous and asynchronous.



Synchronous communication is the exchange of information between two or more people in real-time. It could be face-to-face (like in a meeting or over lunch) or not (like a phone call or video chat).

Synchronous Communications

- *Live meeting:* Gathering of team members at the same location
- *Conference call:* A telephone call in which several people participate
- *Audio conference:* Like a conference call, but conducted online using software like Skype
- *Computer-assisted conference*: Audio conference with a connection between computers that can display a document or spreadsheet that can be edited by both parties
- *Video conference:* Similar to an audio conference but with live video of the participants. Some laptop computers have built-in cameras to facilitate video conferencing
- *IM(instant messaging):* Exchange of text or voice messages using pop-up windows on the participants' computer screens
- *Texting:* Exchange of text messages between mobile phones, pagers, or personal digital assistants (PDAs)—devices that hold a calendar, a contact list, a task list, and other support programs.

Modern communication technologies make it possible to assemble project teams from anywhere in the world. Most people work during daylight hours, which can make synchronous meetings difficult if the participants are in different time zones. However, it can be an advantage in some circumstances; for example, if something must be done by the start of business tomorrow, team members in Asia can work on the problem during their regular work hours while team members in North America get some sleep. They can share their work via asynchronous communications.

Asynchronous communication is the exchange of information between two or more people where there may be a delay between the time when a message is sent and when it is received.

Asynchronous Communications

- Mail and Package Delivery
- Fax
- Email
- Project Blog**:** A blog is an online journal that can be private, shared by invitation, or made available to the world. Some project managers keep a journal in which they summarize the day's challenges and triumphs and the decisions they made. They return to this journal at a later date to review their decision-making process after the results of those decisions are known to see if they can learn from their mistakes. Many decisions in project management are made with incomplete knowledge; therefore, reflecting on previous decisions to develop this decision-making skill is important to growth as a project manager.

4.4. Communication Technology

Assessing New Communication Technologies

New technologies for communicating electronically appear with increasing frequency. Using a new technology that is unfamiliar to the team increases the technology complexity, which can cause delays and increase costs. To decide if a new technology should be included in a communications plan, it will likely be your responsibility to seek answers to the following questions and share the results with your team, often in the form of a report comparing your findings:

- Does the new communication technology provide a competitive advantage for the project by reducing cost, saving time, or preventing mistakes?
- Does the project team have the expertise to learn the new technology quickly?
- Does the company offer support such as a help desk and equipment service for new communication technology?
- What is the cost of training and implementation in terms of time and money?

Communication Plan Template

As the Office Administrator, you will likely not be in charge of creating the communications plan, but you will be responsible for following it. Follow these guidelines:

1. Identify your stakeholders (to whom).
2. Identify stakeholder expectations (why).
3. Identify communication necessary to satisfy stakeholder expectations and keep them informed (what).
4. Identify the time frame and/or frequency of communication messages (when).
5. Identify how the message will be communicated (the stakeholder's preferred method) (how).
6. Identify who will communicate each message (who).
7. Document items – templates, formats, or documents the project must use for communicating.

4.5 Onboarding Team Members

When the team is formed, the original members are usually part of the considerations and decisions made from the first meeting. They have been on the receiving end of group conversations and other communications when updates need to be made. However, if someone new is added to the group at some point during the project, they may feel as if they are playing catch up to fully understand the parts of the process that they were not present for.

Sometimes, we make the mistake of assuming that everyone involved has the same information. But that often isn't the case. Having a plan in place to onboard new team members is a way to ensure a smooth transition for everyone. **Onboarding** is the process of getting everyone on your project team familiar with the project. Having an onboarding process allows you to welcome new team members as needed and ensure that they are joining the team and are fully informed about the goals and processes.

Generally, when you start a project, the members of the Project Team will be determined from the start. However, sometimes projects run over a longer period of time, and that may mean that project team members will shift in and out of their roles. Some team members will leave to be part of other projects once their role in the current project has reached its conclusion, others will leave because they have found other employment, or for some other reason.

In the case of someone leaving your team, it is important to make sure that when a new member is added in their place, the Project Team has an Onboarding Plan in place. This will help the new team members get caught up on the goal of the project as well as the status of the project phases without jeopardizing the pace of the project movement to this point. This point in the project is where having a Project Toolkit in place will be very helpful. We'll learn more about the toolkit later in this chapter.

Your team is on a roll – you've made it through the Initiation Phase and are now deep in the midst of Planning, and you've just learned that your boss has added two new folks to your Project Team! What to do? Help those new Team Members feel welcome by integrating them into your Project Team with a few small steps. Watch the videos below for some tips to successful onboarding.

Video: "How to Onboard People to a Project – Project Management Video" by ProjectManager [3:49] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Tips to Welcome New Team Members:

Video: "How to Make a New Team Member Feel Welcome – Project Management Training" by ProjectManager [3:25] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

4.6. Offboarding Team Members

While we'd like to believe that everyone on the project team will be able to see the project through to the end, there are times when someone needs to take a step back from their role on the team. There are many reasons for folks to do this, among them family leave, sabbatical, health treatments, increased responsibilities elsewhere in the firm, etc. **Offboarding** is the formal process of managing a team member's departure from the project.

What the team chooses to do once someone leaves the team is critical. They may have contacts with some of the vendors working on the project, so you'll need to make sure they share that information with you and the team. Documenting the results of any sort of exit interview that is held with the Project Manager and the departing team member will be one of your responsibilities. It is also important to make sure that the person taking over the responsibilities of the departing member is fully informed of their new role.

The video below shares some other tips for offboarding, in case this is something that you and your team have to deal with:

Video: "How to Transition People Off a Project – Project Management Training" by ProjectManager [2:48] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

4.7. Project Toolkit

A **project toolkit** is a collection of tools (templates, documents, style guides, etc.) that a project team uses to manage their projects. The form the toolkit takes depends on the team using it. Perhaps it's a physical binder with all of the documents printed out. There may be one folder in your electronic records that is easily shareable with all members of the team. It may also be called a Document Toolkit.

One of the best reasons for having a Project Toolkit is so that when someone new joins the team, they can have access to all of the materials that have been created or outlined up to the point that they joined in one place.

The article: Project Management Toolkit by Doitify is an excellent summary of what a Project Management Toolkit could be used for.

Some items that can be included in your Project Toolkit would be:

- Project Charter Template
- Task Checklist Template
- Timeline Template
- GANTT chart Template
- Communication Tools Links
- Collaboration Tools Links
- Glossary (this is especially helpful if your organization uses a lot of acronyms or abbreviations)
- Contact List/Hierarchy Chart for your organization
- Communications Templates (Letterhead, Memo, Agenda, Minutes)

You'll notice that many of the items listed above are templates – that's so that they can be customized for any project that you find yourself working on. You can create a tab at the back of your Toolkit to keep project-specific documents in one place.

When working with OneNote, or other project-based software, you could have all of your templates under one tab, with each project's files under a separate tab.

4.8. Key Terms

Key Terms

- **Asynchronous Communication:** Communication that occurs between two or more parties with a delay between when the information is shared and when it is received. Does not typically occur in a face to face setting.
- **Communications Management:** The communications planning process concerns defining the types of information you will deliver, who will receive it, the format for communicating it, and the timing of its release and distribution.
- **Communications Requirements Analysis:** The first step in defining your communication plan is figuring out what kind of communication your stakeholders need from the project so they can make good decisions.
- **Onboarding:** is the process of getting everyone on your project team familiar with the project
- **Offboarding:** is the formal process of managing a team member's departure from the project
- **Project toolkit:** a collection of tools (templates, documents, style guide, etc.) that a project team uses to manage their projects smoothly
- **Synchronous Communication:** Communication that occurs between two or more people simultaneously. Can be face to face or from a distance.

4.9. What's my Role?

The Administrative Professional's Role

Clear communication and effective onboarding are essential to the success of any project—and as an administrative professional, you often help make both of these happen. You may be the one to send out key information, prepare welcome materials, or make sure new team members have what they need to get started. Whether you're coordinating introductions, setting up email access, or sharing project details, your work helps everyone feel included and informed.

You might also be responsible for maintaining contact lists, managing project email accounts, or helping team members learn how to use collaboration tools. When you help create a welcoming and organized start for new participants, you support a positive team environment and reduce confusion. Good onboarding means less time wasted and fewer misunderstandings later in the project.

Having a communications plan, as well as plans for onboarding and offboarding, can be a vital part of your project toolkit. Remember – this toolkit is yours! It's 100% customizable and should fit your needs. You can change what is in it as you gain experience in your role.

By helping the team communicate clearly from the beginning—and making sure everyone has access to the right information—you play a central role in building trust and keeping the project on track.

Practical Tips

- **Create a Welcome Checklist** – Prepare a simple list of what new team members need when joining the project, such as access to documents, login credentials, contact lists, or key background info. This helps ensure no steps are missed during onboarding.
- **Use Templates for Consistency** – Save time and maintain a professional tone by creating templates for welcome emails, onboarding guides, and meeting invitations. Reusing these tools helps keep your communication clear and consistent.
- **Keep Contact Information Up to Date** – Maintain an accurate, accessible list of all project team members, including roles, phone numbers, and email addresses. This ensures everyone knows who to contact for what and helps new team members feel connected.
- **Be the Friendly First Point of Contact** – Introduce yourself to new team members and let them know you're available to help. A warm, helpful welcome builds trust and makes people feel comfortable asking questions as they get oriented.

CHAPTER 5 - PROJECT MANAGEMENT - THE IMPLEMENTATION/EXECUTION, MONITORING, & CLOSURE PHASES

Chapter Overview

5.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Describe the process and importance of quality planning.
- Outline the importance of managing project progress.
- Examine how work is controlled and monitored during the execution and implementation phase.
- Describe details of quality monitoring practices and report on the project's progress to various stakeholders.
- Discuss the project closure phase.
- Explain the value of project reviews and audits.

5.2. Implementation/Execution Phase

During the third phase, the implementation phase, the project plan is put into motion, and the work of the project is performed. It is important to maintain control and communicate as needed during implementation. Progress is continuously monitored in order to make appropriate adjustments as required, which are then recorded as variances from the original plan. In any project, a project manager spends most of the time in this step.

During project implementation, people carry out the tasks, and progress information is reported through regular team meetings. The project manager uses this information to maintain control over the direction of the project by comparing the progress reports with the project plan to measure the performance of the project activities and take corrective action as needed.

The first course of action should always be to bring the project back on course (i.e., to return it to the original plan). If that cannot happen, the team should record variations from the original plan and record and publish modifications to the plan. Throughout this step, project sponsors and other key stakeholders should be kept informed of the project's status according to the agreed-on frequency and format of communication. The plan should be updated and published on a regular basis.

Planning, Monitoring, and Controlling

From the beginning, a project manager decides what data to collect, how to analyze it, and how to report it. Information is crucial for making informed decisions and keeping the project on track. There are two types of information needed:

- **Feedback**: Information about progress, such as status reports, which helps assess actual performance.
- **Feedforward**: Information about choices and options, such as risk and communication analysis, which helps make adjustments before implementation.

Both types of information are necessary for success. Feedback helps assess performance, while feedforward helps prevent surprises and reduce issues.

Implementation Phase

In the implementation phase, the project team does the actual work to produce the deliverables. Deliverables are the products or services the project provides to the client, customer, or sponsor. The steps to build each deliverable vary depending on the project type.

Project Manager's Role

The project manager coordinates and directs resources to meet the project objectives. They manage each activity, monitor performance, and ensure the final deliverable meets the customer's acceptance criteria. This phase often involves implementing approved changes based on performance and quality control data.

Monitoring and Controlling

Monitoring and controlling systems are designed to track schedule performance, work effort, and expenditures. Managing scope creep and project changes are key responsibilities. Routine performance and quality control measurements help identify problems and recommend changes.

As the office administrator, your role is crucial in ensuring everything runs smoothly. Here are some tips to help you stay focused during this phase:

1. **Maintaining Control and Communication**:
   – Keep track of the project's progress and communicate regularly with the team.
   – Monitor the project continuously to make necessary adjustments and record any changes from the original plan.
2. **Regular Team Meetings**:
   – Organize and participate in regular team meetings to discuss progress.
   – Help the project manager by providing updates and ensuring everyone is on the same page.
3. **Comparing Progress with the Plan**:
   – Assist the project manager in comparing progress reports with the project plan.
   – Help identify any issues and take corrective actions to keep the project on track.
4. **Updating Stakeholders**:
   – Keep project sponsors and key stakeholders informed about the project's status.
   – Ensure updates are provided according to the agreed frequency and format.
5. **Status Reports**:
   – Prepare status reports that highlight the project's progress in terms of cost, schedule, and quality.
   – Ensure each deliverable meets the quality standards and acceptance criteria.
6. **Handling Deliverables**:
   – Understand that deliverables are the products or services your project provides.
   – Ensure all project management documents are up-to-date and organized.
7. **Monitoring and Control**:
   – Help the project manager monitor performance and quality control data.
   – Assist in evaluating routine measurements and recommending changes if needed.
8. **Implementing Changes**:
   – Support the implementation of approved changes to keep the project aligned with its goals.

By following these steps, you'll help ensure the project stays on track and meets its objectives. Your role as an office administrator is vital in coordinating activities, maintaining communication, and supporting the project manager throughout the implementation phase.

Status reports should always emphasize the anticipated endpoint in terms of cost, schedule, and quality of deliverables. Each project deliverable produced should be reviewed for quality and measured against the acceptance criteria. Once all of the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.

5.3. Quality in PM

As an Office Administrator, it's important to understand the concept of quality in project management. **Quality** means making sure you build what you promised and do it efficiently, meeting stakeholders' needs.

In project management, quality involves setting goals and taking measurements to ensure the project meets acceptable standards. It's about making sure the end product satisfies the customers and fits their needs.

Customer Satisfaction

Customer satisfaction means ensuring the people paying for the product are happy with what they get. When gathering requirements, the team writes down what customers want to make sure they are satisfied. Some requirements are common sense and may not be explicitly stated, like ensuring a safe product.

Fitness to Use

Fitness to use means the product should be designed to fit the customer's needs. It's better to have a product that works well for its intended purpose, even if it's not the most attractive or easy to use.

Conformance to Requirements

Conformance to requirements measures how well the product meets the documented requirements. The product should do what was promised, considering both stated and implied requirements.

Quality Planning

Quality planning involves figuring out how to measure quality and prevent defects. This includes:

- Following the company's quality policy and any government regulations
- Planning activities to measure quality
- Considering the cost of quality-related activities
- Setting guidelines for measurements
- Designing tests for the product

Quality and Grade

According to the International Organization for Standardization (ISO), quality is "the degree to which a set of inherent characteristics fulfill requirements." Quality is determined by how well something meets its grade requirements. Even low-grade products should work as expected, be safe, and last a reasonable amount of time.

5.4. Monitoring Phase

As an Office Administrator, it's important to understand the role of monitoring and controlling in project management. Successful project managers use leadership and teamwork to keep everyone on task. They also gather data on the project's health, analyze it, and make adjustments to keep the project on track.

Monitoring and Control

Monitoring involves collecting data on the project's progress and sharing it with the right people. Controlling involves analyzing that data and making changes to avoid missing major milestones. Together, monitoring and controlling help project managers make informed decisions to keep the project on track.

Data Analysis

Collecting data is pointless unless you analyze it to understand the project's current state. For simple projects, this analysis can be straightforward. For complex projects, you may need advanced data analytics tools.

Project Monitoring and Control

This process involves comparing planned performance with actual performance and making changes as needed. It happens alongside project execution, allowing adjustments as team members perform their tasks. A good monitoring and control system acts like a nervous system, sending signals to the project team to respond to changing conditions.

Best Practices

Monitoring and controlling ensure the project stays within scope, on time, and on budget. This involves comparing actual performance with planned performance and taking corrective action when necessary. The process is continuous throughout the project's life.

Active Control

Active control involves two approaches:

1. *Controlling what you can*: Understand what's important, take meaningful measurements, and build an effective team.
2. *Adapting to what you can't control:* Detect issues early and intervene proactively.

The first step in active control is distributing monitoring information to the right people so they can respond. This can involve minor adjustments to tasks or major changes to resources, budget, schedule, or scope.

5.5. Project Reports

After data has been collected and analyzed, it needs to be reported in some form. **Project reports** provide senior management and project teams an opportunity to see whether a project is on track and to determine whether they should do something differently to ensure the projects meet their goals. The fundamental characteristics of a good reporting system include:

Timely, complete and accurate reports are:

- Not too costly
- Readily acceptable to the team and sponsor
- Containing pertinent information only
- Warns of pending problems (feedforward)
- Easy to understand – short and concise

In general, project managers should avoid periodic reports except in those cases in which the flow of data is periodic. Reports issued routinely – every day, week, month, or quarter generally do not get read. Instead, let a project's milestones, scope changes, problems, and the project teams' need for information dictate the timing of reports. The Project Manager will determine what goes in the reports – your job is to prepare and distribute them to the team.

Types of Project Reports

- **Performance/progress reports** –These reports indicate the physical progress to date. The report might include information about procurement, delivery and usage.
- **Status reports** – These reports identify where we are today and use the information from the performance reports to calculate Schedule Variances (SV) and Cost Variances (CV).
- **Projection Reports**– The reports provide forward-looking projections and emphasize where the project will end up.
- **Exception Reports** – These reports identify exceptions, problems, or situations that exceed the threshold limits on items such as variances, cash flows, resources assigned, etc.

After the deliverables have been physically constructed and accepted by the customer, a phase review is carried out to determine whether the project is complete and ready for closure.

5.6. Closing/Closure Phase

Project closure is traditionally considered the final phase of a project. It includes tasks such as

- Transferring deliverables to the customer
- Cancelling supplier contracts
- Reassigning staff, equipment, and other resources
- Finalizing project documentation by adding an analysis summarizing the project's ups and downs
- Making the documentation accessible to other people in your organization as a reference for future projects
- Holding a close-out meeting
- Celebrating the completed project

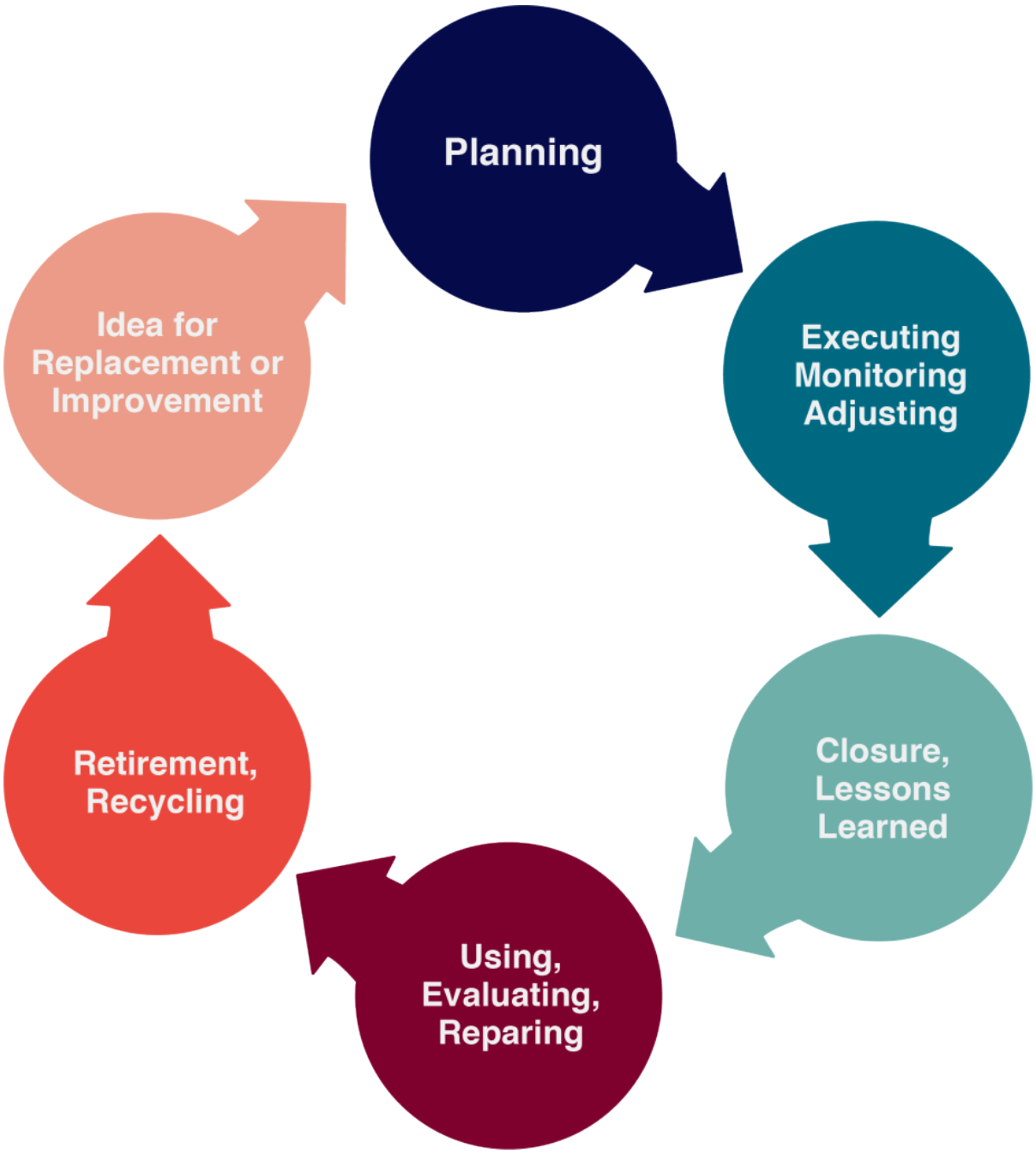


Figure 5.1: Seen from a living order perspective, closure is an extension of the learning and adjusting process that goes on throughout a project.

The Close-Out Meeting is an opportunity to end a project the way you started it—by getting the team together. During this important event, the team should review what went well and what didn't go well and identify areas for improvement. All of this should be summarized in the final close-out report. A final close-out meeting with the customer is also essential. This allows the organization to formally complete the project and lay the groundwork for potential future work.

The Close-Out Report provides a final summary of the project performance. It should include the following:

- Summary of the project and deliverables
- Data on performance related to schedule, cost, and quality
- Summary of the final product, service, or project and how it supports the organization's business goals
- Risks encountered and how they were mitigated
- Lessons learned

Exactly where your work falls in the project's life cycle depends on your perspective as to what constitutes "the project" in the first place. The designers and constructors of a building might consider the acceptance of the building by the owner as project closure. However, the results of the project—that is, the building—live on. Another contractor might be hired later to modify the building or one of its systems, thus starting a new project limited to that work.

If project closure is done thoughtfully and systematically, it can help ensure a smooth transition to the next stage of the project's life cycle or to subsequent related projects. A well-done project closure can also generate useful lessons learned that can have far-reaching ramifications for future projects and business sustainability. The closeout information at the end of a project should always form the basis of initial planning for any similar projects in the future.

Although most project managers spend time and resources on planning for project start-up, they tend to neglect the proper planning required for project closure. Ideally, project closure includes documentation of results, transferring responsibility, reassignment of personnel and other resources, closing out work orders, preparing for financial payments, and evaluating customer satisfaction. Of course, less complicated projects will require a less complicated close-out procedure. As with project audits, the smooth unfolding of the project closure phase depends to a great degree on the manager's ability to handle personnel issues thoughtfully and sensitively. In large, ongoing projects, the team may conduct phase closures at the end of significant phases in addition to a culminating project closure.

5.7. Contract Closing

The office administrator plays a crucial role in the contract closing process. This involves ensuring that all contract versions are tracked, properly signed, and filed with the correct agencies. You can also store the final signed copies in the office for future reference.

Contract Closure

Just as a project comes to a close, so does a contract. **Contract closure** involves completing and settling the terms of the contracts for the project. This process ensures that the work described in the contracts is completed accurately and satisfactorily. Not all projects are performed under contract, so this process applies only to those phases, deliverables, or portions of the project that were performed under contract.

Updating Project Records

Contract closure updates the project records, detailing the final results of the work. Contracts may have specific terms or conditions for completion. Be aware of these terms to avoid delays in project completion. If you are administering the contract, check with your procurement department for any special conditions.

Formal Notice

One purpose of the contract closure process is to provide formal notice to the seller, usually in written form, that the deliverables are acceptable or have been rejected. If the product or service does not meet expectations, the vendor must correct the problems before you issue a formal acceptance notice. Any minor items that need to be repaired or completed are placed on a punch list.

Quality Audits

Quality audits should be performed during the project, allowing the vendor to make corrections earlier rather than at the end. Discussing problems as they occur is more efficient than waiting until the project closes.

Punch List

The project team works on the **punch list**, a list of all the items found by the client team that still remain to be completed, creating a small schedule to complete the remaining work. If the punch list is too large, the project team continues working until it is manageable. The project manager then begins closing down the project, maintaining only enough staff to support the punch list work. See below for some punch list examples.

Formal Acceptance

If the product or service meets expectations, formal written notice to the seller is required, indicating that the contract is complete. This is the formal acceptance and closure of the contract. Document the formal acceptance of the agreement, as specified in the contract itself.

Procurement Department

If the procurement department handles contract administration, inform them when the contract is complete. They will follow formal procedures to notify the seller. Note the contract completion in your project records.

Procurement Contracts

Review the performance of suppliers and vendors to determine if they should remain on the list of qualified suppliers. Review the choice of contract to see if the decision to share risk was justified and if the choice of incentives worked.

Examples: Punch Lists

Here are a few examples of punch lists that might be used in different types of projects:

Construction Project Punch List:

1. Fix the paint touch-ups in the living room.
2. Install missing light fixtures in the breakroom.
3. Repair the cracked tile in the executive bathroom.
4. Ensure all doors and windows are properly sealed.
5. Complete landscaping in the front yard.

Software Development Project Punch List:

1. Resolve the login bug on the user interface.
2. Update the user manual with the latest features.
3. Test the payment gateway integration.
4. Fix the broken links on the website.
5. Ensure all security patches are applied.

Event Planning Project Punch List:

1. Confirm the final guest list with the client.
2. Set up the audio-visual equipment at the venue.
3. Arrange for catering delivery and setup.
4. Print and distribute event programs.
5. Verify all decorations are in place.

These punch lists help ensure that all minor tasks and corrections are completed before the project is officially closed. They provide a clear checklist for the project team to follow, ensuring nothing is overlooked.

5.8. Releasing the Resources

Releasing the Project Team

Releasing project team members is not an official process. However, it should be noted that at the conclusion of the project, you will release your project team members, and they will go back to their functional managers or get assigned to a new project. You will want to keep their managers, or other project managers, informed as you get closer to project completion so that they have time to adequately plan for the return of their employees. Let them know a few months ahead of time what the schedule looks like and how soon they can plan on using their employees on new projects. This gives the other managers the ability to start planning activities and scheduling activity dates.

Final Payments

The final payment is usually more than a simple percentage of the work that remains to be completed. Completing the project might involve fixing the most difficult problems that are disproportionately expensive to solve, so the final payment should be large enough to motivate the vendor to give the project a high priority so that the project can be completed on time.

If the supplier has met all the contractual obligations, including fixing problems and making repairs as noted on a punch list, the project team signs off on the contract and submits it to the accounting department for final payment. The supplier is notified that the last payment is final and completes the contractual agreement with the project.

5.9. Key Terms

Key Terms

- **Active Control:** Takes a two-pronged approach: Controlling what you can by making sure you understand what's important, taking meaningful measurements, and building an effective team focused on project success. Adapting to what you can't control through early detection and proactive intervention.
- **Close-Out Meeting:** is an opportunity to end a project the way you started it—by getting the team together. During this important event, the team should review what went well and what didn't go well and identify areas for improvement.
- **Close-Out Report:** provides a final summary of the project performance.
- **Closure or Completion phase**: the emphasis is on releasing the final deliverables to the customer, handing over project documentation to the business, terminating supplier contracts, releasing project resources, and communicating the closure of the project to all stakeholders.
- **Contract Closure:** Concerned with completing and settling the terms of the contracts for the project. It supports the project completion process because the contract closure process determines if the work described in the contracts was completed accurately and satisfactorily.
- **Deliverable:** This means anything your project delivers. The deliverables for your project include all of the products or services that you and your team are performing for the client, customer, or sponsor, including all the project management documents that you put together.
- **Implementation Phase**: when you and your team actually get to do the project work and generate the deliverables.
- **Project Closure:** is traditionally considered the final phase of a project.
- **Project Reports**: provide senior management and project teams an opportunity to determine a project's status.
- **Punch List:** List of issues/items that require immediate attention and building a small schedule to complete the remaining work.

5.10. What's my Role?

The Administrative Professional's Role

During the implementation and monitoring phases, the project is in full motion—and as an administrative professional, you help keep things on track. You might be organizing schedules, updating task lists, checking in on progress, or keeping records of meetings and decisions. You may also be asked to track milestones or follow up on outstanding items to support the team's goals. Your attention to detail and ability to stay organized are especially important during this busy time.

As the project moves toward closure, your role shifts to helping the team wrap things up smoothly. This might include organizing final documents, preparing reports, or helping close out contracts. You may also be asked to help with punch lists—checklists of tasks that must be completed before the project is officially finished. Your careful tracking and follow-through help make sure nothing is missed.

By staying focused and organized through to the end, you help the team finish strong. Your support makes it easier for the project to close successfully, with all the necessary pieces in place.

CHAPTER 6 - RISK MANAGEMENT & CONTINGENCY PLANNING

Chapter Overview

6.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Define the concepts of risk and risk management.
- Explain the process of risk identification, evaluation and mitigation.
- Identify types of risks based on the project phases.
- Explain the benefits of a contingency plan.

6.2. Risk Management

Risk is potential loss or harm (Canadian Tourism Commission [CTC], 2003a). This could be a financial loss, damage to property, or injury to workers or guests.

Risk management refers to the process of identifying, quantifying, and managing the risks that an organization faces. These may vary significantly depending on the type of operation and the industry undertaking the risk management process. Consequently, it is helpful to think of risk management as being a process of determining the risk exposure and then initiating action to either minimize or eliminate the risk (Enterprise Risk Management, 2004).

Why Practise Risk Management?

There are two main reasons to practise risk management: to avoid injury and to protect business operations from financial or physical ruin.

Keeping guests and employees safe is a moral and ethical responsibility of operators and includes avoiding emotional and physical harm. Protecting business operations includes protecting against damage to property, damage to reputation, and any financial impacts occurring from litigation (Centre for Curriculum, Transfer, and Technology [CCTT], 2003a). By practising this twofold approach, operators demonstrate that they are prioritizing the health and safety of individuals while still taking steps to protect the operational sustainability of their company.

On a larger scale, practising effective risk management can be seen as an important business skill. The Canadian Tourism Commission (2003a) suggests that risk management:

- Reduces the likelihood of an unwanted and unplanned event
- Reduces the consequences of the event
- Enhances your ability to access comprehensive and cost-effective insurance

Risk management can be undertaken at any scale. Individuals, companies, societies, communities, cities, regions, and even governments can follow the process in order to protect themselves from risks, which may range from company-specific risks, such as disruption of revenue, to significant international risks, such as climate change and civil disturbances.

Some risk management initiatives are easier than others; they are required by law and enforced by government agencies. For example, companies providing public transportation (such as passenger transport in a bus) have clearly defined requirements as set out by their local motor vehicle branch in government. They are required to use appropriately licensed drivers, submit to commercial vehicle inspections, and insure their vehicles as required. Failing to adhere to these standards may result in suspension of operating privileges, fines, or even imprisonment.

However, other aspects of risk management are not regulated so extensively. This is characteristic of the majority of tourism and hospitality activities offered in Canada today. Operators offer services to the general public and self-regulate in terms of safety. If injury to a guest occurs, and that guest feels that he or she has grounds for a financial claim, that person can initiate a lawsuit against the tourism operator. If this claim is found valid in court, then the tourism operator may have to pay a large financial settlement to that claimant.

In short, tour operators must comply with applicable statutory requirements and be sure to self-monitor to determine if the standard that they are operating at is acceptable to society and their peers. Failing to do so may result in a range of consequences, including fines, suspension of operations, or a lawsuit. Clearly, risk management for tourism and hospitality is a complicated process.

Concepts of Risk

Before we examine the risk management process, let's look at three theoretical concepts of risk: real risk, perceived risk, and inherent risk.

- *Real risk* is the actual statistical likelihood of an incident occurring. This is established through reviews of statistics and other relevant data, an analytical process, and the use of expertise in the field. There is little ambiguity or subjectivity in real risk (CTC, 2003a).
- *Perceived risk* is the perception of risk by those undertaking or evaluating something; it may vary greatly based on their level of apprehension, anxiety, or experience with the specific risk. Perceived risk can also vary greatly from the real risk of an activity; it can be higher or lower than the actual risk. Successful management of perceived risk may include operators promoting the risk of activity as high, even if, in reality, the risk is minimal. This strategy can ensure the successful delivery of an exhilarating, challenging experience while remaining safety conscious (Dowling, 1986).
- *Inherent risk* is the risk that must exist for the activity to occur; examples include the risk of drowning when swimming and the risk of falling during skiing. It is impossible to eliminate inherent risk from these activities because it would preclude participating in them. However, operators should take steps to minimize inherent risk; this could include, for example, providing appropriate safety equipment for guests, training staff, and informing participants of the hazards of the activity (CCTC, 2003b).

6.3. Risk Identification and Evaluation

Managing risks on projects is a process that includes risk assessment and a mitigation strategy for those risks. **Risk assessment** includes both the identification of potential risks and the evaluation of the possible impact of the risk. A **risk mitigation plan** is designed to eliminate or minimize the impact of the risk events—occurrences that hurt the project. Identifying risk is both a creative and a disciplined process. The creative process includes brainstorming sessions where the team is asked to list everything that could go wrong. All ideas are welcome at this stage, and the evaluation of the ideas will come later.

Risk Identification

A more disciplined process involves using checklists of potential risks and evaluating the likelihood that those events might happen to the project. Some companies and industries develop risk checklists (also called Risk Registers) based on experience from past projects. These checklists can be helpful to the project manager and project team in identifying specific risks on the checklist and expanding the team's thinking. The past experience of the project team, project experience within the company, and experts in the industry can be valuable resources for identifying potential risks on a project.

Identifying the sources of risk by category is another method for exploring potential risks in a project. Some examples of categories for potential risks include the following:

- Technical
- Cost
- Schedule
- Client
- Contractual
- Weather
- Financial
- Political
- Environmental
- People

Risk Evaluation

After identifying the potential risks, the project team evaluates each risk based on the probability that a risk event will occur and its possible loss. Not all risks are equal. Some risk events are more likely to happen than others, and the cost of a risk can vary greatly. Evaluating the risk for the probability of occurrence and the severity or the potential loss to the project is the next step in the risk management process.

Having criteria to determine high-impact risks can help narrow the focus on a few critical risks that require mitigation. For example, suppose high-impact risks could increase the project costs by 5% of the conceptual budget or 2% of the detailed budget. Only a few potential risk events meet these criteria. These are the critical potential risk events that the project management team should focus on when developing a project risk mitigation or management plan. Risk evaluation is about developing an understanding of which potential risks have the greatest possibility of occurring and can have the greatest negative impact on the project (Figure 6.1). These become the critical few.

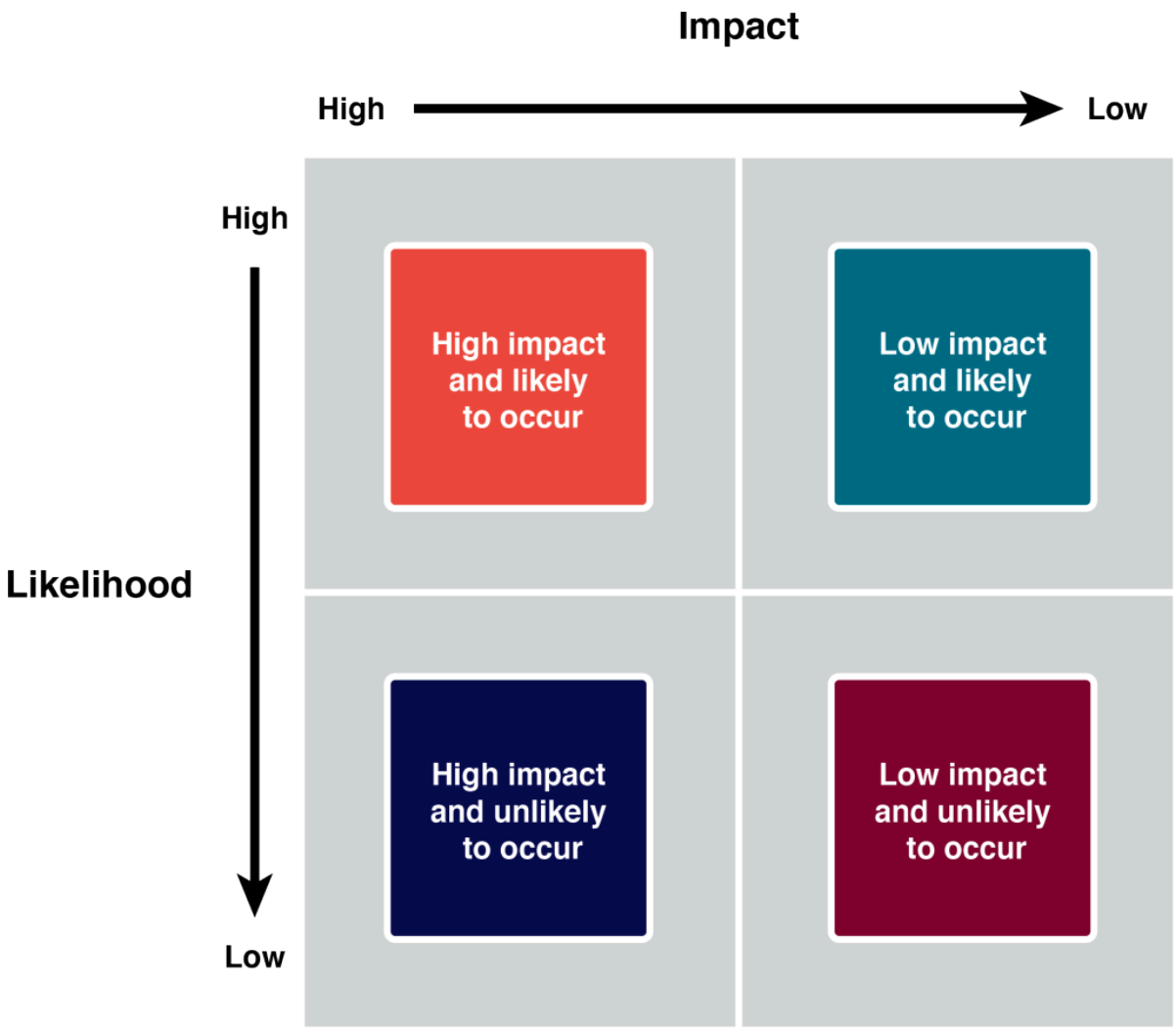


Figure 6.1: Risk and Impact

Risk evaluation often occurs in a workshop setting. Building on identifying the risks, each risk event is analyzed to determine the likelihood of occurrence and the potential cost if it did occur. The likelihood and impact are rated high, medium, or low. A risk mitigation plan addresses the items with high ratings on both likelihood and impact.

This and other risk management tools can be useful because they provide an objective framework for evaluating the seriousness of risks to your project. However, any risk assessment tool can do more harm than good if it lulls you into a false sense of security, so you make the mistake of believing you have foreseen every possible risk that might befall your project. You don't want to make the mistake of believing that the tools available for managing risk can ever be as precise as the tools we use for managing budgets and schedules, even as limited as those tools are.

Perhaps the most important risk management tool is your ability to learn about the project. The more you know about a project, the better you will be at foreseeing the many ways the project could go awry and what the consequences will be if they do, and the better you will be at responding to unexpected challenges.

6.4. Risk Mitigation

Risk Mitigation

After the risk has been identified and evaluated, the project team develops a risk mitigation plan, which is a plan to reduce the impact of an unexpected event. The project team mitigates risks in various ways:

- Risk avoidance
- Risk sharing
- Risk reduction
- Risk transfer

Each of these mitigation techniques can be an effective tool in reducing individual risks and the risk profile of the project. The risk mitigation plan captures the risk mitigation approach for each identified risk event and the actions the project management team will take to reduce or eliminate the risk.

Risk Avoidance usually involves developing an alternative strategy that has a higher probability of success but usually at a higher cost associated with accomplishing a project task. A common risk avoidance technique is to use proven and existing technologies rather than adopt new techniques, even though the new techniques may show promise of better performance or lower costs. A project team may choose a vendor with a proven track record over a new vendor that is providing significant price incentives to avoid the risk of working with a new vendor. The project team that requires drug testing for team members is practicing risk avoidance by avoiding damage done by someone under the influence of drugs.

Risk Sharing involves partnering with others to share responsibility for risky activities. Many organizations that work on international projects will reduce political, legal, labour, and other risk types associated with international projects by developing a joint venture with a company located in that country. Partnering with another company to share the risk associated with a portion of the project is advantageous when the other company has the expertise and experience the project team does not have. If a risk event does occur, then the partnering company absorbs some or all of the negative impact of the event. The company will also derive some of the profit or benefit gained by a successful project.

Risk Reduction is an investment of funds to reduce the risk of a project. For international projects, companies will often purchase a currency rate guarantee to reduce the risk associated with fluctuations in the currency exchange rate. A project manager may hire an expert to review a project's technical plans or cost estimates to increase confidence in that plan and reduce the project risk. Assigning highly skilled project personnel to manage high-risk activities is another risk-reduction method. Experts managing a high-risk activity can often predict problems and find solutions that prevent the activities from having a negative impact on the project. Some companies reduce risk by forbidding key executives or technology experts to ride on the same airplane.

Risk Transfer is a risk reduction method that shifts the risk from the project to another party. The purchase of insurance on certain items is a risk-transfer method. The risk is transferred from the project to the insurance company. A construction project in the Caribbean may purchase hurricane insurance that would cover the cost of a hurricane damaging the construction site. The purchase of insurance is usually in areas outside the control of the project team. Weather, political unrest, and labour strikes are examples of events that can significantly impact the project and that are outside the control of the project team.

6.5. Risks in Project Phases

Project risk is dealt with in different ways depending on the phase of the project.

Initiation

Risk is associated with things that are unknown. More things are unknown at the beginning of a project, but risk must be considered in the initiation phase and weighed against the potential benefit of the project's success in order to decide if the project should be chosen.

Planning Phase

Once the project is approved and it moves into the planning stage, risks are identified with each major group of activities. A risk breakdown structure (RBS) can be used to identify increasing levels of detailed risk analysis. This format helps the team have a clearer understanding of where risks are most concentrated. Visit the PMI website to see an example of an RBS.

Implementation/Execution Phase

As the project progresses and more information becomes available to the project team, the total risk on the project typically reduces as activities are performed without loss. The risk plan needs to be updated with new information, and risks related to activities that have been performed must be checked off.

Understanding where the risks occur on the project is important information for managing the contingency budget and managing cash reserves. Most organizations develop a plan for financing the project from existing organizational resources, including financing the project through a variety of financial instruments. In most cases, there is a cost to the organization to keep these funds available to the project, including the contingency budget. As the risks decrease over the length of the project, if the contingency is not used, then the funds set aside by the organization can be used for other purposes.

To determine the amount of contingency that can be released, the project team will conduct another risk evaluation and determine the amount of risk remaining on the project. If the risk profile is lower, the project team may release contingency funds back to the parent organization. If additional risks are uncovered, a new mitigation plan is developed, including the possible addition of contingency funds.

Closing Phase

During the closing phase, agreements for risk sharing and risk transfer need to be concluded, and the risk breakdown structure must be examined to ensure all the risk events have been avoided or mitigated. The final estimate of loss due to risk can be made and recorded as part of the project documentation.

Practice: Risks by Phase in Sunny Horizons, Inc. Expansion Project

Text Description

After reading the previous pages, take some time to consider (anticipate) what kind of risks might be present in the various phases of the expansion project for Sunny Horizons, Inc. Note your thoughts below:

- Initiation:
- Planning:
- Implementation/Execution:
- Monitoring:
- Closing:

6.6. Contingencies

In addition to creating the project plan, you need to create a **contingency plan**, which is a plan for addressing key possible obstacles to project success. A contingency plan defines alternate paths for the project in case various risks are realized.

A contingency plan typically includes a **contingency fund**, which is an amount of resources set aside to cover unanticipated costs. Contingency plans and funds are necessary because even the most seasoned project planner sometimes succumbs to excessive optimism, assuming everything will go well and that all resources will be available when needed. Also, no matter how thoroughly you plan a project, you will inevitably miss at least a few small issues.

Examples of issues that might necessitate the use of a contingency fund:

- Inadequate initial estimates
- Small items not covered in planning
- Errors in initial estimates
- Small deviations due to inevitable delays

Note that a contingency fund is not designed to manage major deviations or scope changes.

A simple and effective form of contingency planning is setting aside a contingency fund consisting of a fixed percentage of all resources (time, money, people) in addition to the amounts spelled out in the final budget. Ten percent is a typical amount, but that can vary depending on the size and type of project, as well as the type of industry.

Contingency planning is closely related to risk management. When you are working on small projects of limited complexity, you can probably assume that a fixed percentage contingency plan will cover most risks. However, for highly complex, technically challenging projects, it's important to distinguish between generic budget planning contingencies (using a fixed percentage) and the more sophisticated modelling of risk for uncertainty.

6.7. Contingency Planning for Events

HEATHER BEECROFT

As we've learned in this chapter, just like with projects, when planning an event, it is important to always expect the unexpected! When working as an executive administrative assistant – it is best practice to always have a backup plan in place when planning meetings, events or even when planning your workday. Murphy's Law is the concept that 'anything that can go wrong will go wrong. It is really the idea that anything that could go wrong should have a backup plan or a contingency plan.

The video below is a very clear example of what goes wrong when an event is not properly planned, and no contingency plan is in place.

Video: "Fyre Festival co-founder speaks out: Took a 'big risk' and failed" by ABC News [6:05] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Categories to Include in a Contingency Plan

It can help to create categories to group the challenges you are trying to anticipate because some of the solutions may be the same for a variety of problems. The list below is high-level, and there are many more issues to consider when planning an event. As with any event or project, the plan should be customized to the event or project it applies to.

- **Man-made Disturbances**
  - Strikes
  - Street crime
  - Riots
  - Kidnapping
  - Terrorism
- **Natural Disasters**
  - Blizzards
  - Earthquakes
  - Fire
  - Flooding
  - Heat wave
  - Tornado
- **Technological Problems**
  - Audio-visual issues
  - Power failure
  - Computer malfunction
- **Health/Medical Emergencies**
  - Pandemics

- Heart attacks
- Heat stroke
- Personal injury

Remember, in 2019, no one would have thought to plan for a pandemic when organizing an event, but fast forward to today, if you do an internet search for "event planning contingency", almost all of the top results are related to pandemics/COVID-19.

Access to Alcohol

Access to alcohol is taken seriously at public events because it comes with added liability. As the event planner, your job is to be highly aware of the laws surrounding the provision of alcohol to guests. Make sure that you ask about alcohol service and consumption when you are planning the event (does your boss *want* to have alcohol available), and decide on a venue. It's important to understand local laws – so make sure you know how to find them.

Ontario Liquor License Act

It is recommended that those serving alcohol be 'Smart Serve' trained.

The best choice is to have trained professionals serve alcohol to guests. Generally, this is taken care of by the venue, as they are usually the party responsible for holding the liquor license. In all cases, if alcohol is being served at your event, make sure that the contracts you sign with the venue and catering providers are clear about who is responsible for serving.

6.8. Key Terms

Key Terms

- **Contingency fund:** This is a number of resources set aside to cover unanticipated costs.
- **Contingency plan:** A contingency plan defines alternate paths for the project in case various risks are realized.
- **Risk:** is potential loss or harm (Canadian Tourism Commission [CTC], 2003a). This could be a financial loss, damage to property, or injury to workers or guests.
- **Risk assessment:** includes both the identification of potential risks and the evaluation of the possible impact of the risk.
- **Risk avoidance:** This usually involves developing an alternative strategy that has a higher probability of success but usually at a higher cost associated with accomplishing a project task.
- **Risk management:** The process of identifying, quantifying, and managing the risks that an organization faces.
- **Risk mitigation plan:** is designed to eliminate or minimize the impact of the risk events—occurrences that hurt the project.
- **Risk reduction:** This is an investment of funds to reduce the risk on a project. On international projects, companies will often purchase the guarantee of a currency rate to reduce the risk associated with fluctuations in the currency exchange rate.
- **Risk sharing:** Involves partnering with others to share responsibility for risky activities. Or, hiring someone else to take on that part of the project.
- **Risk transfer:** A risk reduction method that shifts the risk from the project to another party. The purchase of insurance on certain items is a risk-transfer method.

6.9. What's my Role?

The Administrative Professional's Role

In any project or special event, things don't always go as planned—and that's where risk management and contingency planning come in. As an administrative professional, you may not be making the big decisions about risks, but you often play a key part in helping the team prepare for the unexpected. You might assist in gathering information about possible risks, keeping track of backup plans, or ensuring that important contact information and documents are easy to find in case something goes wrong.

Your role also includes staying calm and organized when things shift. You may be asked to help communicate changes quickly, reschedule meetings, or coordinate new arrangements if a plan needs to change. In special event planning, you might even be the one keeping track of weather forecasts, double-checking supplier confirmations, or helping create alternate timelines, all while communicating these updates to the most affected stakeholders.

By supporting the team's planning and staying ready to adapt, you help reduce stress and keep the project or event running smoothly—even when surprises come up.

Practical Tips

- **Keep an Up-to-Date Emergency Contact List** – Create and maintain a list of key contacts (vendors, venues, team members, emergency services) that can be accessed quickly if plans change or issues arise.
- **Prepare Backup Documents and Copies** – Always have digital and/or printed copies of essential documents like schedules, contracts, and vendor agreements. If technology fails or changes are needed on the fly, you'll be ready. While we'd love to believe that technology will always work – that is not always the case- having analog versions as backup is a great idea.
- **Build in Buffer Time** – When helping schedule timelines, add a little extra time between key tasks or events. These buffers can help reduce stress if delays happen and make the overall plan more flexible.
- **Ask, "What if?" During Planning** – As you support the team, ask simple questions like "What if the delivery is late?" or "What if the venue cancels?" This helps others think through possible issues early—and shows you're thinking one step ahead.

CHAPTER 7 - PROJECT MANAGEMENT - FEEDBACK AND FOLLOWUP

Chapter Overview

7.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Discuss the value of evaluation.
- Explain the components of a 360 evaluation.
- Explain the process of gathering feedback.
- Determine which style of feedback meets the needs of the team.
- Explain the benefits of a debriefing process.

7.2. Evaluation and Feedback

HEATHER BEECROFT

Your project is nearing the end of its lifecycle, or you're on the last day of a conference, and you want to know "how it went", right? That's where evaluation comes in. It's important to take a good look at the good and the bad so that you know how to make changes as needed for the next project or event. **Evaluation** is the process of assessing an experience.

According to the experts at indeed.com (2025), there are several key things to consider as you're designing an evaluation. The key question to ask is:

What is the goal of the evaluation?

- Are you working to improve performance?
- Are you trying to build relationships?
- Are you trying to determine the relevance of the event?

One major goal of evaluation is to measure how successful the team was at meeting the project's goals. Having that information will very likely help with the Planning Phase for future projects (indeed.com, 2025).

The article: Project Evaluation: What It Is and How To Do It does a good job of explaining several types of evaluations (pre-project, ongoing, post-project, self, and external), as well as step-by-step methods for designing and implementing an assessment.

Feedback is part of the evaluation process. Generally, it is the response of a single entity (person, group, vendor) providing information about their experience. So, to complete an *evaluation*, you need to gather *feedback* from folks involved in the event/experience. For instance, every time you leave your ride-share driver a rating, that's feedback. Same for reviews placed online for stores you've made purchases from. Even social media is receiving constant feedback . . . every component of engagement is feedback, which can all be added together by the driver/store/content creator to evaluate their service or product.

Video: "Understanding Project Management: Evaluation" by Plymouth College of Art – Certificate in Creative & Cultural Practice [7:25] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

7.3. 360 Degree Evaluation

One item missing from the Indeed article in the previous chapter, however, is the value of conducting what's called a **360-degree evaluation** or multi-source assessment. 360-degree feedback is typically used to evaluate people and their performance in a workplace, but it can also be used to evaluate a project or event. The reason that a 360-degree evaluation is so powerful is that it examines the subject being evaluated from all angles. Rather than just asking the event attendees about their experience at the event, a 360-degree evaluation asks the vendors, the staff, the attendees, and the organizers (to name a few) about their experience with the event. It offers a much more full picture of what went really well and where improvements can be made before the event is held again.

The article: 8-step 360 Degree Feedback Process Timeline from Explorance.com does an excellent job explaining the process and timeline for an effective 360-degree evaluation.

Video: "What is 360 degree feedback?" by Hudson Recruitment [2:59] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Video: "360 Degree Feedback in a Nutshell | AIHR Learning Bite" by AIHR – Academy to Innovate HR [3:57] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

As demonstrated in the videos above, 360 evaluation or 360-degree feedback can be a powerful tool. It's important to understand why you would want to ask for feedback from folks involved in all aspects of your event to make it even better in the future, right? But how do you get the feedback? What method do you use? And what questions to ask? That's all covered in the next chapter.

7.4. Designing Effective Evaluations

One component mentioned in the videos in the earlier chapter was *how* you design your evaluation. Sometimes, you can have a face-to-face conversation or focus group with stakeholders to ask them questions and get verbal responses. A **focus group** is a style of evaluation that is generally a small, carefully selected group of folks invited to discuss a particular topic in a conversation guided by a facilitator. A very basic example of this occurs many evenings after a family dinner. Mom (facilitator) asks, "So, how was dinner?" and that elicits feedback from all who ate (participants) . . . "It was delicious!", "I thought it was too salty." "I wish we didn't ever have to eat broccoli again!" is verbal feedback in that particular focus group. Sometimes, focus groups watch a video and offer verbal feedback. Other times, they might provide feedback on a rating sheet or survey.

A focus group is a very efficient way to gather feedback since you really only have to host one meeting for each group of stakeholders. But what if one person dominates the conversation? Or another person refuses to talk? What if folks are worried that their answers might get back to someone who is in charge of their job? What if the event is too large and you are unable to gather all of the participants in one space to have a focused conversation?

Those concerns could lead you to determine that a more anonymous/private survey is the way to go. If you choose to create a survey or evaluation form, it's critical that you are careful when choosing what you want to evaluate and designing the questions, statements, and rating criteria to gather the information that you want.

The article: How To Write Feedback Forms (With Templates and Examples) from Indeed.com has some excellent examples of things to consider as you write a feedback form, and even includes some templates.

A **feedback survey** is a structured questionnaire used to collect opinions about an event or experience from folks who participated in that event/experience. The survey might be completed using paper and pencil, online, or via phone. Surveys can be very simple ratings or involve a longer answer style.

Tailoring Your Evaluation

You've decided that you want to gather feedback from everyone involved in your event, so now you need to make some decisions. How do you want to gather that feedback? And what do you want to ask?

Deciding what to ask is determined by what you actually want to know. What were you most unsure about when planning the event?

- Venue
- Music/Entertainment
- Speakers
- Vendors
- Food
- Decorations
- Cost

To keep folks engaged in the feedback process, it is a good idea to make sure your questions are focused on the areas you're seeking to improve, not the areas that you don't want outside opinions on. We'll get into the types of questions to ask in a moment, but let's focus on the *what* part of evaluating now. Let's say you were limited in your choice of venue due to the location or time of year. You can't really change that, so rather than asking questions about the venue, focus the questions on things that can change, such as food and speakers. You can always include a more open-ended question at the end, and you may get comments about the venue there.

Once you've decided what you want to evaluate, now you get to decide how to ask the questions. Anyone who has hosted an event and asked for feedback afterward will likely tell you that the best results that they get are by targeting their questions to the audience. Yes, it would be faster to have one survey that is given to every person who attended the event (speaker, host, vendor, volunteer, attendee, etc.). However, if folks feel that the questions don't apply to their experience, they are less likely to offer valuable feedback. See below for some samples.

Tailoring Questions for the Audience

Planning Team:

1. What were the primary goals and objectives of the event, and were they achieved?
2. How effective was the planning process in terms of timeline, budget, and resource allocation?
3. What challenges were encountered during the planning phase, and how were they addressed?

Sponsors:

1. Did the event meet your expectations in terms of visibility and brand exposure?
2. How satisfied are you with the audience engagement and interaction opportunities provided?
3. What suggestions do you have for improving sponsor benefits in future events?

Attendees:

1. Were you satisfied with the overall experience of the event?
2. What aspects of the event did you find most engaging, and why?
3. Do you have any suggestions for enhancing future events?

Speakers:

1. How would you rate the audience engagement during your presentation?
2. Were the logistics and technical support satisfactory for your session?
3. Do you have any recommendations for enhancing the speaker experience?

7.5. Evaluation Methods

In previous sections, we discussed a couple of styles of feedback gathering: surveys and focus groups. There are other methods used to gather feedback, including interviews (one-on-one conversations with stakeholders), observation (watching the event and taking notes of what you see), and social media monitoring (what is being posted on social media channels about the event). The point of this chapter is to explore the pros and cons of each of the methods so that you can start to determine which combination of styles might be the best fit for your events.

Surveys

Surveys can be completed in a variety of ways (paper/pencil, over the phone, digitally) and offer a structured method of gathering feedback. Everyone gets the same questions that are chosen specifically by the evaluator. Each option can be used to reach a large audience – you can mail the paper versions, phones work around the world, and digital versions can be shared in many ways. Their anonymous nature allows folks providing feedback to potentially feel a little more comfortable answering honestly. However, they have some drawbacks as well, including potentially low response rates if the survey is too long, too general, or given to them at an inopportune time. Creating the perfect survey question often takes a lot of time, so evaluators may not feel it is worth their time. What experiences have you had with surveys? What would you add to this list of pros and cons?

Interviews

Because interviews are usually conducted in a personal, one-on-one setting, they allow for a more in-depth exploration of a participant's experience. The interviewer can direct follow-up questions based on the participant's answers. The biggest negative aspect of interviews is likely the time it takes to conduct them. They are time-consuming to conduct and to summarize. Additionally, participants may be less comfortable offering honest feedback because the interview is not likely to be anonymous. Finally – if the interviewer is not properly trained, they may make the mistake of guiding a participant's response in one direction or another, which would skew the feedback results.

Focus Groups

Unlike interviews, **focus groups** are conducted in groups – the size of the group is determined by the person seeking the feedback. The groups can provide a diversity of answers that is not always possible in other settings. Folks offering feedback in groups often feel emboldened to share more readily in an effort to get their voice heard, especially if there is a feeling of comfort around collaboration to build on each other's feedback. For instance, when surveyed about a recent experience watching a television pilot, one participant may not have noticed the music in the background until another participant mentioned it as pleasant. That comment spurs others to offer feedback about the music that the organizer may not have even thought to ask about. On the other hand, however, sometimes there can be a dominant voice in a focus group who speaks up so much that others do not feel comfortable offering their thoughts – either because that person is voicing similar feelings or the louder person is overpowering and the quieter person doesn't feel as if their opinion is valued in the same way. It will be important for the facilitator to work to make sure all participants in a focus group have an equal chance to speak if desired.

If you'd like to learn more about how to organize and run focus groups, this article from Masterclass does a great job of clearly outlining the steps.

Observation

If there is time and the space allows, **observation** can be a very powerful feedback tool. Observers can capture an overall vibe at an event by watching how people interact with each other, how they flow through space, what foods are going back into the kitchen cold versus which trays are going back empty. They can also make note of non-verbal responses that attendees are making to the speakers to supplement the qualitative feedback provided using other methods. Unfortunately, sometimes, personal bias can overshadow a true representation of what is happening, and confirmation bias might occur. **Confirmation bias** is the tendency to interpret new information as confirmation of one's existing beliefs or theories. In this case, an example of confirmation bias might be found if someone is observing a speaker who is talking about a topic that the observer finds confusing. When they observe folks in the audience to gauge their response, the observer might make a note of all of the attendees who have confused looks on their faces or look bored. That would confirm their thoughts that the speaker is boring and uninteresting.

Social Media Monitoring

Social media monitoring is an opportunity for event organizers to get a real-time response from attendees as they capture the engagement of attendees on a variety of social media platforms. If organizers create and advertise a common hashtag for folks to use when posting about the event on their personal platforms, they will get a broad sense of both positive and negative feedback from attendees. The negative side of using social media monitoring as a feedback source is that the posts may lack depth. Additionally, negative feedback on social media may cause detrimental consequences for the organizer, especially if the poster has a large and loyal following. Monitoring all of the social media platforms used by attendees can be difficult, so a lot of thought should go into whether or not this is an appropriate avenue for feedback for your event.

By understanding the pros and cons of each of the methods described above, event organizers can work with their teams to select the most appropriate approach based on the objective of the event, the resources available to them, and the preferences of all stakeholders. Sometimes, a combination of evaluation methods might be the most comprehensive path to gaining actionable insights for improving future events.

Source

OpenAI. (2025). *ChatGPT.* [Large language model]. https://chat.openai.com/chat

Prompt: *"I need to write an essay about how to evaluate a recently held event. I'm interested in teaching students how to evaluate the event from all angles, so I discuss the importance of 360-degree evaluation. Explain how you would change the style of questions you ask the different stakeholders for an event, such as the planner, sponsors, attendees, organizers, speakers, vendors, and hosts. It should include some examples of questions that could be asked. It should also include examples of different evaluation methods."* Heavily edited by the author.

7.6. Event Debriefing

In the dynamic world of project management, the end of an event marks not only the culmination of hard work but also an opportunity for reflection and learning. Once the event is over and you've gathered the feedback you desire, you'll need to have a debriefing event with the event team. **Debriefing**, the process of reviewing and discussing the event, is crucial for extracting insights, identifying successes and areas for improvement, and fostering team cohesion.

As aspiring office administrators, mastering the art of debriefing is essential for your future roles in leading successful projects. In this chapter, we will explore the importance of debriefing, common concerns team members might have, and strategies for addressing these concerns through real-life case studies.

The Importance of Debriefing

Debriefing serves several very important purposes in project management and event planning. It allows team members to reflect on what worked and what didn't, which allows groups to have conversations about continuous improvement for future projects/events. Additionally, it provides a sense of closure to the project which allows team members to mentally prepare to transition to a new task or event. Finally, it provides an opportunity for bonding through open communication about the project, which can boost team cohesion and morale.

Common Concerns in the Debriefing Process

- *Fear of Criticism* – some team members may feel as if they will be criticized for their performance or contribution to an event. This can be addressed in the debriefing process by the facilitator emphasizing the importance of constructive feedback. They can encourage team members to focus on lessons learned in general rather than finding a way to place blame on a single person. One method to prevent this concern is to make sure to acknowledge achievements (both of the team and individuals) before discussing areas for improvement.
- *Lack of Closure* – team members may feel uncertain about the final outcome of the project/event and their roles moving forward. To address this, the debriefing facilitator can make a summary of the outcomes and achievements available to the team. This can serve as a tangible reminder of the success and completion of the event. This will also provide an opportunity for team members to really feel as if their contributions are valued within and beyond the organization.
- *Time Constraints* – some members of the team may not see the value of spending time after an event is over talking about that event. "It's done; why are we wasting time on that event when I have this next event to work on??" might be their attitude. It is important for the facilitator to stress the long-term benefits of a debriefing process toward future project outcomes.

The video below highlights four specific questions that you could ask your team during a debriefing session.

Video: "Event Planner Tips: 4 Questions to Ask Your Team During Your Event Debrief/Post Event

Report" by Logan Clements [5:29] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube*.

Source

OpenAI. (2024). ChatGPT. [Large language model]. https://chat.openai.com/chat

Prompt: "*I need to write an essay about how to evaluate a recently held event. I'm interested in teaching students about how to evaluate the event from all angles, so discuss the importance of 360 degree evaluation. Explain how you would change the style of questions you ask the different stakeholders for an event, such as the planner, sponsors, attendees, organizers, speakers, vendors, and hosts. It should include some examples of questions that could be asked. It should also include examples of different evaluation methods*." Heavily edited by author.

7.7. Multi-Day Conference Debrief Benefits

You will be working on a multi-day conference project that simulates a real-world experience for many Office Administrators. After orchestrating a multi-day conference, the inclination to wrap up quickly and move on to the next task may be strong. However, taking the time to conduct a thorough debriefing process is invaluable for several reasons, including updating all members of the team on the outcomes, prompting communication among the team, and providing closure after a shared experience.

Let's delve deeper into why debriefing holds particular significance after such an event. We've discussed debriefing in general, but now, let's focus on how the debriefing process might work with a very specific example.

Reflecting on Successes and Challenges

A multi-day conference is a complex project involving numerous moving parts, from event logistics to attendee engagement and speaker management. Debriefing allows the team to reflect on what went well during the conference and what challenges were encountered. This reflection provides valuable insights into the effectiveness of various strategies and processes employed, helping the team understand what contributed to the conference's success and what could be improved in the future.

Topics to consider: Was the transportation provided between events sufficient? Were there sessions that were poorly attended? If so – why do we think that is? What did folks observe during mealtimes/snacks? What went better than expected?

Learning and Improvement

Debriefing after a multi-day conference enables team members to identify key lessons learned from their experiences. These lessons could encompass a wide range of aspects, including event planning, communication strategies, problem-solving techniques, and stakeholder management. For instance, were there any logistical challenges with the speakers? If only one person on the team was interacting with the speakers, the other members of the team may not realize that something didn't happen as expected on the day they were giving the keynote address. By distilling these lessons, the team can enhance their skills and knowledge, ultimately improving their ability to manage similar projects in the future.

Enhancing Team Collaboration and Communication

Effective collaboration and communication are essential for the smooth execution of any project, particularly one as complex as a multi-day conference. Debriefing fosters open dialogue among team members, providing a forum for sharing perspectives, addressing concerns, and brainstorming ideas for improvement. Through collaborative discussion, team members gain a deeper understanding of each other's roles and contributions, strengthening team cohesion and unity. Even if each member can't be fully present during the debriefing

session, they should be offered the opportunity to provide their feedback before the meeting is held so that it can be shared with other members of the team.

Ensuring Stakeholder Satisfaction

In the realm of office administration, satisfying stakeholders is paramount. A multi-day conference involves various stakeholders, including sponsors, vendors, speakers, attendees, and organizational leadership. Debriefing allows the team to evaluate the conference from the perspective of these stakeholders, identifying areas where expectations were met or exceeded and areas where improvements are needed. By addressing stakeholder feedback and concerns, the team can enhance stakeholder satisfaction and maintain positive relationships for future events.

Facilitating Closure and Transition

Concluding a multi-day conference marks the end of a significant undertaking for the project team. Debriefing provides a sense of closure to the project, allowing team members to mentally transition to new tasks and projects. By reflecting on their achievements and challenges, acknowledging their contributions, and expressing gratitude for their efforts, the team can celebrate their successes and prepare for future activities with renewed focus and motivation. A key component of debriefing that sometimes gets overlooked is the celebration of success. Often, teams feel as if the debrief is an opportunity to gripe and focus on the things that went wrong, but that doesn't equate to a true reflection. Celebrate the successes, large and small!

If you're ready to host a debriefing but aren't sure what questions to ask, the folks at ThoughtLeaderZone.com have a list for you to prompt the conversation. The article is a little old, but still relevant.

Source

OpenAI. (2024). ChatGPT. [Large language model]. https://chat.openai.com/chat

Prompt: "*I need to write an essay about how to evaluate a recently held event. I'm interested in teaching students about how to evaluate the event from all angles, so discuss the importance of 360 degree evaluation. Explain how you would change the style of questions you ask the different stakeholders for an event, such as the planner, sponsors, attendees, organizers, speakers, vendors, and hosts. It should include some examples of questions that could be asked. It should also include examples of different evaluation methods*." Heavily edited by author.

"Candidate" by Undraw, Undraw License

7.8. Key Terms

Key Terms

- **360-degree evaluation:** an evaluation process that seeks input from all angles.
- **Confirmation Bias:** the tendency to interpret new information as confirmation of one's existing beliefs or theories.
- **Debriefing:** the process of reviewing and discussing an event with the event team after the conclusion of the event.
- **Evaluation:** the process of assessing an experience by gathering feedback from attendees.
- **Feedback:** the response from an attendee providing information about an experience.
- **Focus Group:** a conversation between a group of people guided by a facilitator to gather feedback about a common experience.
- **Interview:** a conversation between two people where one is asking questions for the other to answer.
- **Survey:** a structured questionnaire used to gather opinions about an experience.

7.9. What's My Role?

The Office Administrator's Role

After a project or event is finished, it's important for the team to take time to reflect on what went well and what could be improved. This is called the debriefing process. As an administrative professional, you can play a big part in helping this process run smoothly. You might schedule the debriefing meeting, prepare notes or reports, or gather feedback from team members, clients, or attendees.

During the meeting, you may be asked to take notes, help keep the discussion on track, or organize comments into categories like "successes," "challenges," and "suggestions." Afterward, you might create a summary or follow-up document that captures the team's insights and lessons learned to share with the team members. These documents can be valuable when planning future projects or events, so it is important that they be filed with other documents from this event.

By supporting an honest and thoughtful debrief, you help your team grow and improve. Your careful documentation and communication ensure that the knowledge gained from one project can be used to make the next one even better.

CHAPTER 8 - EVENT PLANNING - INTRODUCTION AND OVERVIEW

Chapter Overview

8.1. Chapter Introduction

Learning Objectives

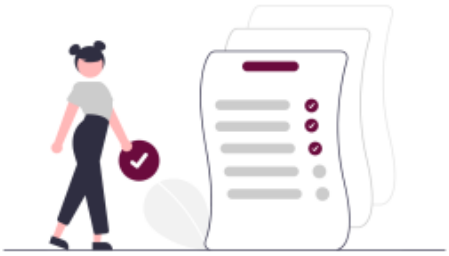
By the end of this chapter, you should be able to:

- Explain the key elements that contribute to event success.
- Summarize the event planning process.
- Suggest tactics meetings and event planners can utilize to be sustainable and positively impact the planet.
- Reflect on strategies meetings and event planners can implement to positively impact diversity and inclusion within the industry.

8.2. Event Components

HEATHER BEECROFT

In your role as an executive assistant, you will play various roles related to event planning; you need to be prepared to do everything from scheduling a small meeting to booking training facilities/days to participating in teams planning large sector-specific conferences and retreats, both on-site and off-site.



Common Event Planning Duties

It is crucial you have an understanding of all of the duties and tasks that go into planning an event so you are able to properly manage your time. This section of the module provides a high-level list of some of the more common duties one should expect to complete when planning an event and demonstrates the importance of using a task list to keep track of this exhaustive list.

- Interview key players:
    - Whose idea was this event?
    - What are their expectations for this event? (informative, entertaining, team-building, etc.)
- Conduct research:
    - Use the internet to find out more about similar events
    - Ask people within the organization who may have been part of past events
- Pinpoint the purpose/goal of your event
- Form a committee:
    - Co-workers
    - Event experts
    - External volunteers
- Defray costs with sponsorships (we'll learn more about this):
    - Monetary donations
    - Barter a service in exchange for tickets to the event
    - Donations of swag
- Choose a location:
    - Onsite – is your office space large enough to handle the event you're planning?
    - Offsite – do you need to find a location somewhere else (could even be in a different city)

to host the event?

- Arrange for refreshments/catering
- Negotiate with vendors
- Hire speakers and entertainers
- Sign contracts
- Plan transportation
    - From airports/train stations
    - To/from events off-site
    - Is this free? How is it paid for?
- Send invitations:
    - Save-the-date
    - Invitation
    - Follow-up letter/email with event details
- Arrange for accommodations:
    - Block rooms for attendees to get a better rate
    - Provide accommodations for speakers as part of their contract
    - Book rooms for all staff to stay on-site, even if they live nearby
    - Book extra rooms just in case there's an emergency
- Make sure the equipment works
- Supervise operations while on location
- Troubleshoot problems
- Evaluate the results

And for all of those duties, plan to be invisible and do not expect any gratitude or recognition. It's not great to hear, but sometimes, just knowing that the attendees had no idea what was going on behind the scenes is the best reward of all!

"To Do List" by Undraw, Undraw License

8.3. Creating a Task List

HEATHER BEECROFT

One of the most important tasks in making sure that your events run smoothly is creating a very detailed event planning checklist or **task list**. This item should be part of your Project Toolkit, and it should include:

- Every single to-do item or task – a detailed list of everything you need to complete for the event from start to finish (this should include a debrief and other activities that occur following the event)
- Who each task is assigned to – a specific team member should be assigned accountability for each task
- A due date – each task should have a target completion date
- Somewhere to track completion – there should be a place to include a checkmark or note about whether the item is complete or incomplete.

There are several software platforms designed to do just this. Search the internet to find out more, give some a try, and see which one fits your personality and work style best before choosing one. The video below demonstrates what to consider when creating a task list.

Video: "How to Create an Event Planning Checklist" by International Institute of Event Management [2:01] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube*.

Having a task list with specific team members assigned to each task will help to ensure that one person is not overwhelmed with more tasks than they can manage. It is also helpful to understand your team member's personalities and work styles while your team determines who will be responsible for each assigned task. When assigning duties, it is important to keep everyone's strengths and weaknesses in mind.

8.4. Event Documents

It is important to be organized when supporting a group that is planning an event – your tasks list is only one of the very many important documents you will need to keep. You may choose to use a binder or file-share (such as OneNote) for the purpose of storing all your documents. Using dividers, sections and appropriate file names and folders can help ensure you are able to find important documents when you need them.

Some common documents to keep in your binder/file-share are:

Timeline forms to stay on track

- √ 6 months prior
- √ 3 months prior
- √ 1 month prior
- √ 2 weeks prior
- √ 1 week prior
- √ Day of event
- √ Post-event

Contacts

- √ Name
- √ Affiliation
- √ Contact details

Contingency Plans

- √ Emergency Situation
- √ Contact
- √ Action

Budget

- √ Item
- √ Estimated total
- √ Actual total
- √ Difference

Assignments

- √ Task
- √ Responsible team member
- √ Deadline
- √ Date completed

Program Details

- √ Time
- √ Activity
- √ Speaker
- √ Location
- √ Responsible team member

When you see it all spelled out like this it seems like a LOT of work, doesn't it? The volume of work is exactly why we have event committees – to disperse the work evenly among folks using their strengths and weaknesses as a determining factor in who gets to do what. It's also why having a "Responsible Team

Member" field in your task list is critical. Who to call on for questions and concerns? The Responsible Team Member.

8.5. Event Themes

HEATHER BEECROFT

An event **theme** is the overall feel of an event that sets the tone for all aspects, from decorations to advertising and more. When planning your theme, you need to think of *who* is attending, *why* the event is happening, *where* the event will be located, and *what* the purpose of the event will be. Think of the theme as the *how* – how you will combine the who, why, where, and what together to provide a well-thought-out and cohesive package.

Determine Your Purpose

Ask yourself why you are having the event. You want to create event anticipation, maximum guest attendance, and full participation. You will need to meet company and guest expectations, which you will likely determine during the initiation phase of this event. The objectives of an event can be tangible (for instance, raising a certain amount of money for a charity) or intangible (long-term employee morale).

Consider the experience. Will it be:

- *Educational*? The Human Resources Department is having a day-long event to onboard new employees. They will need to get new employees informed about company policies.
- *Entertaining*? You work for the tourism board in your city, and the red carpet event for a holiday movie that was filmed downtown is happening in one month.
- *Enlightening*? Your company is hosting a two-day wellness retreat for all employees at a local yoga center.
- *Energizing*? The company just went through a merger and needs to get all of the employees on board with new policies and excited about working with new team members.
- *Engaging*? A local author who is new on the scene wants to drum up more readers, so they ask your independent bookstore to host a reading.

Connect the Dots

Take your purpose and link it to your goals for the experience you'd like to provide for the attendees. Think about how your theme would appeal to your guests and build your program and events around your theme. Look at your to-do list and event requirements, and try to incorporate your theme as much as possible.

When choosing a party theme for company get-togethers, corporate planners need to ensure the theme is relevant and fun. But most importantly, they need to make sure it's appropriate for the event, setting, and company culture. (Waida, n.d.).

25 Corporate Event Themes for Unforgettable Company Parties
Event Planning podcasts

8.6. Sustainability & Inclusion

As the world grows and changes, so do events and how they are run. Each event host has unique needs and requests from the venue to make their event one of a kind. These requests may range from an indoor bounce house or petting zoo to a karaoke happy hour. As people come up with new ideas and new types of events to host, event organizations must remain flexible and work to meet their client's demands.

Sustainability

It is no surprise that in-person meetings use a lot of resources and produce a lot of waste. For this reason, hotels and other event venues are trying to find ways to make their event operations more **sustainable**. Sustainable events cause little or no damage to the environment through a variety of conscious choices made by the event team.

By becoming more sustainable, these operations can reduce waste and cut down on costs. Hotels and event venues can take steps toward becoming more sustainable, including:

- Utilizing china over disposable dishes
- Collecting recyclable materials in separate containers
- Utilizing reusable name tags for attendees
- Offering water in pitchers with glasses rather than disposable bottles or cups
- Buying seasonal, locally sourced ingredients for food service
- Merging menus with other clients using the venue on the same day
- Maximizing transportation to minimize repeat trips, reducing emissions
- Reduce paper by offering program information on a digital platform
- Charge groups for wasted food when attendance is over-quoting

For even more ideas, check out this free guide from Event Industry News.

Accessibility

Banquets and events should be designed so that anyone interested in attending can take advantage of all the event has to offer. As most hotels already have many accommodations available to their guests, attendees of events in these venues can take advantage of the resources available. Guests with physical disabilities may need assistance getting through the buffet line or ensuring there is sufficient space for their wheelchair or walker. Guests with a hearing impairment may need closed captions or a sign language interpreter during presentations. Guests with visual impairment may need assistance navigating the event space or require a place for their guide dog to sit next to them.

Diversity & Inclusion

Any event organization's banquet and set-up departments will typically be diverse. These areas of the operation will often employ high school and college students and individuals from disadvantaged populations

to serve in part-time roles. Upon proving themselves, these individuals are usually promoted to leadership positions, ensuring a diverse staff at all levels. Some hotels also offer second chance programs for those formerly incarcerated who have completed rehabilitation programs. Many individuals learn culinary skills while incarcerated. Because of this, hotel events allow them to have a second chance to work in areas such as set-up and banquet operations. In addition to hiring a diverse staff, event venues can encourage their clients to select speakers and entertainers from diverse backgrounds. When event attendees come from other regions, providing a list of local talent can be a great way to represent the diversity of the area. Those interested in becoming event managers can participate in MPI's Inclusion Event Strategist Certification Program to learn more about presenting inclusive events.

Video: "Inclusive Events: Training for Inclusive Event Staff" by MSFTEnable [4:11] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Technology

As noted above, when events first started taking place, typewriters and handwritten contracts were used to make all of the bookings. As technology has advanced, so has how events are booked. A lot of events are booked through email or over the phone. This is made easy by having programs like Opera that allow sales managers to look at all banquet and hotel rooms and see what is available and when. This also helps to prevent double-booking a room or promising groups more rooms than what is actually available.

Technology advancements also help when it comes to meetings. More and more often, virtual meetings are combined with in-person meetings. This means half the group meets in person while others call in and watch via programs like Zoom or Skype. By having the technology and ability to project them on screens, everyone is able to attend no matter where they are.

Other ways event managers and hosts can utilize technology:

- Hosting events online can be more efficient and allow individuals anywhere in the world to collaborate in real-time
- Moving online saves paper, from digital contracts to providing event details on a mobile app to eliminating the need for printed signage at in-person events.
- Digital events allow for instant feedback during the event, from interactive mobile apps to digital session surveys.
- Event venues may offer an app for meeting planners to request services such as changes to the thermostat, additional beverages, trash pick up, etc.
- Attendee apps extend beyond providing event details to allow for networking between attendees.

"6.5: A Great Big Beautiful Tomorrow" from All Are Welcome: An Introduction to the Hospitality Industry by

8.7. Key Terms

Key Terms

- **Diversity:** representing folks from all walks of life
- **Inclusion:** the act of ensuring that everyone feels welcome
- **Sustainable:** causing little to no harm done to the environment
- **Task List:** a detailed list of tasks to be completed for an event
- **Theme:** the overall feel of an event that sets the tone for all aspects from decorations, to advertising, and more

8.8. What's My Role?

Exercises

An event of any size should essentially be thought of as a project. The Office Administrator's role will be supportive in most cases. However, there may be times when you're leading an event planning team. You will be responsible for taking minutes at all planning meetings, but you might also be responsible for doing research in terms of venue, catering, entertainment, etc. For event planning, it is key for the Office Administrator to be flexible and ready to take on whatever task is asked.

Once again, your time management, information gathering, document organization, and clear communication skills will serve you well when supporting an event planning team.

CHAPTER 9 - EVENT PLANNING - DOCUMENT ORGANIZATION

Chapter Overview

9.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Explain why document organization matters.
- Explain what kind of organization system is the best.
- Demonstrate best practices for naming conventions and folder structures.
- Explore tools & technology options for document organization.
- Anticipate common problems and understand how to prevent them.

9.2. Document Organization

Imagine this: It's Monday morning at Sunny Horizons, Inc., and a minor panic is spreading through the office. The CEO needs a signed contract now for a client meeting, but no one can remember where it was saved. Was it emailed? Is it in the shared drive? Did someone print a hard copy and put it on a desk?

Thirty minutes later, the file is finally found—saved on someone's desktop under the name "contract1234(3)finalNEW." Everyone breathes a sigh of relief... but the stress, confusion, and wasted time could've been avoided with better organization.

Document organization means having a clear and consistent way to store, name, and retrieve both digital and physical documents. This includes everything from company policies and invoices to meeting minutes, templates, and client files.

It's not just about where things are saved—it's about how you save them, why you save them, and who can find them later.

And the organization of documents is important, no matter the size of the company you're working for. All companies have documents that need to be organized so that they can be retrieved quickly when needed. Developing a system that works, however, isn't always a natural talent – it takes time to learn how to create a system that works for the company.

Why It Matters in Office Administration

As an administrative professional, you're often the go-to person when someone needs a file "right away." Whether it's a contract for a client, a report for a meeting, or a travel receipt for reimbursement, the expectation is that you'll have it—and quickly.

When files are well-organized:

- You save time
- You reduce stress
- You prevent errors and duplication
- You support your team's productivity

When they're not:

- You lose time searching
- You risk sending the wrong version
- You may miss deadlines or lose trust

Digital or Paper—It All Counts

Even in today's digital offices, paper files haven't disappeared. At Sunny Horizons, for example, the finance department still prefers to keep printed copies of expense reports. Meanwhile, HR stores everything digitally in a cloud-based system.

Whether you're filing something in a drawer or a shared folder, the same principles apply: make it findable, make it logical, and keep it consistent. Knowing about each of these systems is helpful for all Office Administrators. Check out the resources below to learn more about each.

Office Dynamics International – tips for organizing digital files

Birch Tree Organizing – tips for paper files (this is geared toward a home/family, but the principles could apply at work as well)

The Office Organizer – keeping the paper managed at work

The most important tip from that last article is to make sure that the paper gets managed as soon as possible. While a single sheet of paper doesn't seem like it takes up that much room – when the paper starts to pile up, the task of organization can feel like a mountain to climb.

Getting Ahead of the Mess

Most disorganized systems don't start out that way—they become messy over time. There are a few unlabeled files here, a couple of "temporary" folders there, and suddenly, no one knows where anything is.

Your role in document organization is not just cleaning up a mess—it's preventing it from happening in the first place. Most successful Office Administrators will tell you that spending a little time each day managing the documents will save a lot of time in the long run.

In the rest of this chapter, we'll walk through how to build a system that works for you, tools that can help, and how to avoid common pitfalls. Whether you're just starting out or stepping into a more advanced role, these skills will help you stay confident, efficient, and prepared for anything your office throws your way.

9.3. Developing a System

You've just started your co-op placement at Sunny Horizons, Inc. The new branch in Calgary has opened, and your task is to work with the London office to get things back in order at Headquarters after a whirlwind six months working on the expansion project. On your first day, your manager asks you to find a vendor agreement for last year's company retreat. You open the computer on your desk, which you've just gained access to – and immediately feel lost.

The folders in the shared drive are labelled with random abbreviations and numbers. Some documents are saved on the desktop. Others are buried in emails.

What should've taken five minutes takes nearly an hour. Sound familiar? It's clear the person at your desk previously didn't feel confident in developing a system for document organization. They took a "saving it somewhere is better than nothing" approach and hit the "Save" button without much regard for what happened next. Preventing this sort of experience is why document organization matters. A task that should have taken moments with a simple search took much longer.

There's No "One Right Way"

Document organization is not about perfection—it's about creating a system that works for the people who use it. A **document management system** (DMS) is a system that is used to organize documents in an organization. That system might be simple or detailed, digital or physical, but it has to be:

- *Easy to understand* – would anyone in the office be able to look at a folder or filename and tell you what is housed within?
- *Consistent* – do all files and folders have the same naming pattern (naming convention) as others like it?
- *Accessible to those who need it* – can anyone in the office who needs a particular file get to it easily, or do they need a password or special access?
- *Sustainable* – will this system last for a long time? Or is it only feasible for the current project?

As an administrative professional, your job often includes helping a team stay organized. Sometimes, that means building a system from scratch. Other times, it means adapting to a system already in place. Or you might tasked with making updates to an existing system. Before making changes, however, it is important to get buy-in from everyone who is going to be using the system developed. Rather than working to rename files in a way that makes sense only to you, you should first spend time learning the culture of the company and get a better understanding of what the employees expect from the document system. This is a great opportunity to do an evaluation of the existing system by gathering feedback from those who have utilized it so far. The best system is the one that works for all who are using it.

Designing a System

Before setting up or revising a DMS, ask yourself:

- Who needs to access these files?
- How often will the documents be used?
- Will the files need to be shared with people outside the organization?
- How long should documents be kept? Some companies have regulatory bodies that they answer to, which require documents to be retained for a certain period of time before they can be destroyed.
- What kinds of documents are we dealing with? Are there confidentiality issues that need to be mitigated?

The answers to these questions will help you decide how to sort and label files. You may choose an **alphabetical** system (by client name), a **chronological** one (by year and month), or a **category-based system** (finance, HR, events, etc.).

This WikiHow article lists step-by-step instructions that might be helpful if you're designing a filing system from scratch.

A Word About Standards

Even though your system should work for *you*, there are professional standards worth knowing—especially if you want to grow in your role. One is the **ARMA** recordkeeping principles. These principles focus on things like accountability, transparency, and retention.

9.4. Naming Conventions & Folder Structures

Let's go back to Sunny Horizons for a minute.

You've finished cleaning up the document mess that you were greeted with on the first day back from the expansion. You did such a good job that you've been noticed by the HR department. They need assistance to organize employee training records, and they have asked your supervisor if you can help them out for a couple of days. When you finally gain access to the shared drive and have a look at the files, you see files with the following names:

- Doc1_final.docx
- HR_mtg_notes_april.pdf
- TrainingPlan_USETHIS1.xlsx
- Notes(2)

Yikes. You're probably thinking: "Doc1_Final" – final what? "HR_mtg_notes_april" – that's better. At least we know the meeting happened in April. But *what year*? And are these the final approved minutes to be filed, or just some random person's scribbles?

Because you are an organized person and know that organized files are easier to work with than disorganized ones, you know the existing filenames and their lack of logical pattern will make it hard to keep track of important documents—especially over time. You set to work getting things renamed and into an organized system. But what names should you use for the files?

Why Naming Matters

A clear, consistent naming system makes it easier to:

- Find documents quickly
- Know what version you're viewing
- Avoid duplication
- Collaborate with others

This naming system is most commonly referred to as a **naming convention**, which is a structured framework for naming files. The structure or format that you choose for naming your files should follow a pattern that is consistent and easy to interpret. According to the article below, the best naming conventions offer consistency, transparency, and ease of location (Clark, 2025).

What is the Importance of Naming Conventions

Tips for File Naming

There's no universal rule, but here are some helpful conventions:

- Use dates in YYYY-MM-DD format for easy sorting (e.g., 2025-04-09_EventBudget.docx)
- Keep names short but descriptive (e.g., SunnyHorizons_HiringPolicy.docx)
- Avoid spaces or special characters—use underscores or dashes instead
- If versions are relevant, include them (e.g., Proposal_V2.pdf, MeetingNotes_Draft1.docx)

Bad example: Final_final_USE_THIS_ONE.doc
Better example: ClientProposal_V3_2025-04-01.docx

Once you and your team have developed a system, it would be helpful to create a quick "cheat sheet" of naming rules. You can share this with your team and make sure it is posted prominently in areas where folks are creating new files. Also, this reference document would be a great item to have in the front of your Document Toolkit as it will make sure that anyone who has your job after you get promoted will understand the naming conventions that were used while you were setting up the system that is in place. It will also help new employees who are being onboarded to know what the naming conventions and folder structures are from the beginning of their time with your company.

Careful consideration should ensure the file name you've chosen is visible to folks searching for it. If you are too verbose in your naming, it can be hard for someone unfamiliar with the project to know what's in the file. If it is too short, however, a person may feel like they need a decoder ring to determine the contents of a file (Hutchenreuther, 2023).

Too long: SloanWedding_Catering_BridalBreakfast_June2025_SmoothSconeBakery_Signed
Too short: SWBB625sgn
Just right: SloanWdg_SSBakery_2506

The Importance of Careful File Naming

Folder Structures That Make Sense

The **folder structure** refers to how you've organized folders and subfolders in your digital file management system. Here's a simple folder structure example for a team working on events:

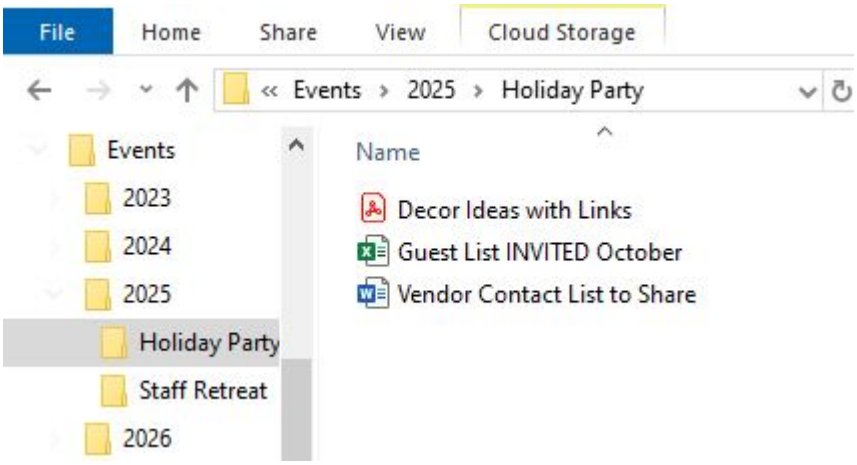


Figure 9.1 – This folder system is set up to use broad topics that house subfolders with specific events, and then within the subfolder are documents of various types with names describing the file contents. Source – author's collection.

A good folder system:

- Mirrors how your team talks about their work (don't overcomplicate it!)
- Keeps related documents together
- Follows a consistent logic—by date, project, department, or a mix

Using the system in the image as our sample, you can see that it follows a consistent logic – all events in one year are grouped together, with subfolders for each event. In each subfolder are the documents that are specific to that event. The naming of the files matches how the office talks about the events – simple names that describe them: "Holiday Party", "Staff Retreat". The theme of the holiday party was A Tropical Holiday Shindig, but that doesn't need to be in the folder name. The same goes for the Staff Retreat, which was held at a yoga centre in Quebec – there is no need to put those kinds of details in a folder name. The details are within the documents.

If everyone follows the same structure and naming style, you'll avoid frustration and wasted time. It may take some time to get everyone in the office on board with the system that you've developed, but once they see the benefits, you should see consistency develop.

9.5. Tools & Technology

Digital Tools You'll Likely Use

As an administrative professional, you'll often keep the team on track. That means knowing how to use digital tools for storing, sharing, and organizing files. You may also be responsible for teaching others in the office how to access and save documents using the selected tool. In Chapter 2, we discuss the importance of collaboration tools in project teams. Consistency in the tools used within an organization is key to having everyone be on board to use the system/tool that is chosen.

In the table below, you will find some information about some of the most common file storage and sharing tools used in offices:

Tool	Use	Why It Helps	Challenges
Google Drive	Store and share documents	Easy to collaborate in real-time	Not very intuitive to organize
OneDrive	Cloud storage for Microsoft files	Integrated with MS Office tools	Some Mac compatibility, but best used by MS
Sharepoint	Intranet and document library	Great for larger teams and permissions	Steep learning curve
Dropbox	File sharing and backup	Clean interface and version history	Somewhat outdated
File Explorer (Windows) or Finder (Mac)	Local folder structure	Still important for managing desktop files	Syncing can be sluggish

These tools help you:

- Access files from anywhere – this is very helpful for employees working remotely
- Work collaboratively without emailing documents back and forth – this means there is no need to wait for someone else to have time to find and share a file with you. Everyone can access the files on their own timeline.
- Control permissions – the owner/creator of a file can determine who has access to view/edit/share so you can eliminate accidental problems.
- Avoid duplication and version confusion – this can also be helped by using the naming conventions mentioned earlier in this chapter.

Best Practices for Using Technology

- Use shared folders instead of email attachments. This helps cut down on folks having to search through their emails to find a document. If they can't remember who sent it or what folder they might have put it in, they may get quite frustrated and ask to have it sent again. By using shared folders, folks can access the files whenever they wish. A **shared folder** is a digital storage space on the company network that is accessible by multiple employees who are part of the network. It is the digital equivalent of a drawer in a filing cabinet.
- Set clear editing permissions (view-only vs. edit access). Some of the tools allow you to limit what kind of access each member of your team can have.
- Organize files within each platform—don't treat the cloud as a digital junk drawer. Remember the systems

that we discussed in the previous section – this is why we stress the importance of organization!

- Regularly archive or delete outdated materials. This decluttering process will help you maintain a clean shared file. It will be critical, however, to make sure that only one person is deleting files. Perhaps you could create a “temporary trash” folder for folks to move outdated materials to, and if they haven’t been accessed after a certain period of time, they can be deleted.

At Sunny Horizons, the team now uses a shared OneDrive folder for each event. Everyone has access, but only the admin assistant can rename or reorganize files. This small change has saved hours of frustration.

9.6. Common Problems and How to Avoid Them

Even with the best intentions, disorganization can creep in. Let's look at some common document issues—and how to fix them before they become habits.

Problem	Example	Solution
Lost files	"I swear I saved it somewhere; I just don't remember where."	Use a clear folder structure and consistent file names. Save regularly while working.
Duplicate files	"Charter_v1", "Charter_v1_new", "Charter_realFINAL"	Use version numbers or dates consistently. Rename older files and delete files that are no longer needed.
Multiple copies	The team saves the same file in several places, just in case. (email, cloud, USB, desktop, printed)	Agree on a single location for the final version of all files.
Poor file naming	"ImportantNotes.docx" or "KeepThis.xlsx"	Determine and follow a naming convention that includes the information your team has deemed relevant.
No backup	Files saved on a single password-protected computer	Use a cloud storage system that is accessible by at least two employees and has a backup to a secure server, if possible.

Are there experiences you have had with document naming/filing that you would add to this list of common problems? What would you suggest to peers and colleagues to prevent that from happening again?

Checklist: Are You Staying Organized?

- Files have meaningful names.
- You (and your team) know where to find things.
- Old files are archived or deleted regularly.
- You've backed up your important documents.
- You know who has access to what.

It's not about being perfect—it's about building small habits that save time and reduce stress.

9.7. Key Terms

Key Terms

- **Alphabetical:** a filing system that is based on the alphabet.
- **Category-Based:** a filing system that is based on common categories or general topics.
- **Chronological:** a filing system that is based on dates.
- **Document Management System (DMS):** a system used to organize documents within an organization.
- **Document Organization:** having a clear and consistent way to store, name, and retrieve digital and physical documents.
- **Folder Structure:** how you've organized folders and subfolders in your digital file management system.
- **Naming Convention:** a structured framework for naming files.
- **Shared Folder:** digital storage space on the company network accessible to multiple employees.

9.8. What's My Role?

The Office Administrator’s Role

As an administrative professional, you might not be the one setting official document retention policies—but you will make sure things don’t fall through the cracks.
Your role is to:

- Create or maintain a system that works for your team.
- Encourage consistent naming and storage habits.
- Use technology to keep files organized, shared, and secure.
- Ask questions when a system isn’t working.
- Keep learning—different industries and offices will have different needs.

Whether you’re working on a team event or supporting a busy executive, good document-storing habits help everyone stay on track. Your system doesn’t have to be perfect, but it has to work for you and be easy to maintain.

CHAPTER 10 - EVENT PLANNING - MARKETING YOUR EVENT

Chapter Overview

10.1. Chapter Introduction

Learning Objectives

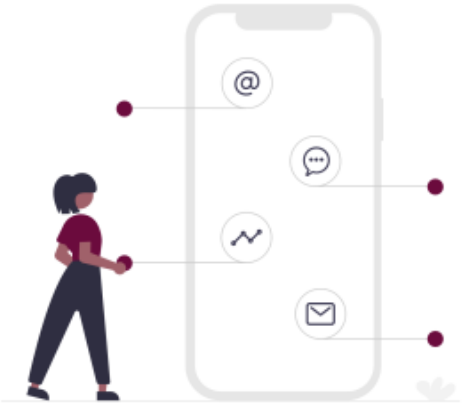
By the end of this chapter, you should be able to:

- Explain why marketing an event is essential.
- Determine how to identify your audience.
- Explain the reason for utilizing more than one platform to promote your event.
- Present information about your event in a clear, concise, consistent message.

10.2. Event Marketing Basics

Why Marketing Matters

Marketing helps people know that an event is happening, understand why the event matters, and decide to attend. Good marketing can increase interest, improve attendance, and create excitement. For office professionals, this means helping to share information in a clear, accurate, and friendly way.



Even if you are not in charge of marketing, you may be asked to support the marketing team by creating materials, sending messages, or posting on social media. In smaller companies or in-house events, you might lead these tasks yourself. No matter the size of the event, helping to promote it is an important part of the event planning process.

Soft Skills in Event Marketing

Marketing isn't just about tools—it's also about communication. You may need to:

- Work with other departments within your company, like Marketing or Sales.
- Make adjustments to your plan quickly based on feedback from the team or your audience.
- Maintain a positive and team-based outlook regardless of the circumstances.

Good marketing starts with understanding people. By utilizing your skills of organization, clear communication, and helpful attitude, you can support the message and ensure a successful event.

Getting Folks Excited About Your Project

Marketing is not limited to an exciting event like a fundraiser or charity fun run. It may be required for a company project like an office expansion or a merger. When you are part of a team that has begun the Initiation Phase of a project, you may realize that you need to get the folks who are part of your organization excited about the changes that are headed their way. We call that buy-in. The article below does a great job of outlining many of the key points summarized here:

- Start early to get information about the project to the audience.
- Figure out the best way to get folks excited or on board with the project (this may involve using several methods, depending on your audience).
- Remind frequently and in many places.

A Step-by-Step Guide to Event Promotion

While that article is primarily about events, the same message could relate to a project that isn't necessarily an

event. It's important to remember that although we may have transitioned to learning primarily about events, the same principles apply to projects and other group experiences.

Video: "How To Promote Your Event Online" by JaiTV (Jai Stone) [7:45] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

"Mobile Marketing" by Undraw, Undraw License

10.3. Understanding the Audience

Before creating any promotional material, it's important to think about who the **audience** is. Who is this event for? Is it just for coworkers? Is it open to clients, partners, or the general public? Knowing who the audience is will affect how you write and how you share the information.

For example

- If the event is a staff appreciation lunch, an internal email with a friendly tone may be best. You could consider posting a couple of printed flyers around the office if the lunch date is more than a week away and you need folks to **RSVP**.

> RSVP is an abbreviation for 'répondez s'il vous plaît'. The English translation is "please respond", meaning you wish for the folks who were invited to let you know if they intend to attend or not. This is usually reserved for more formal events or events when food is being served, so an accurate head count (attendance estimate) is needed.

- If it's a large conference open to the public, a formal website and social media posts may be needed. You may also need to do a mail campaign or purchase advertising space in print and digital media.
- If the audience is younger – you might consider using language that they are using, while older folks may appreciate a more formal tone.

Knowing your audience helps you choose the right tools and the right words.

As the Office Administrator, you will not likely be responsible for creating any of these campaigns, but you will likely be tasked with keeping track of any contracts or ensuring that payments get made if needed.

10.4. Marketing Tools

Many tools make event marketing easier. As an administrative professional, you don't need to be an expert in all of them—but it helps to know what they do and how they might be used.

- Canva: A free online design tool that helps you create posters, social media graphics, and invitations using templates. It's easy to use, even for beginners.
- Mailchimp: A platform that helps you send professional-looking email campaigns. You can create lists, design messages, and create a schedule to plan when emails go out.
- **Social Media Platforms:** You might help create posts for LinkedIn (for professional events), Instagram or Facebook (for public or community events), or X (formerly Twitter) for short updates.
- **Scheduling Tools**: Apps like Later or Hootsuite let you plan and schedule posts ahead, so your messages go out when they'll have the most impact.

If your organization already uses these tools, take the opportunity to learn them. If not, ask how they share event information—you may be helping with this process soon!

"Social Media" by Undraw, Undraw License

10.5. Promoting Your Event

Creating Promotional Materials

You might be asked to help create or proofread materials like:

- Event posters or flyers – these are usually the size of a standard piece of paper and easy to post in high-visibility areas. The graphics components of Word and PowerPoint can often serve this need in a pinch.
- Email invitations – these are generally used to send the first round of information to your target audience, often via the mail merge process, and they have basic information, including a link to find more information on the web or a phone number to call
- Social media posts – can be regularly scheduled and timed to keep the audience interested in learning more.
- Website updates – if your company has an active web presence and is comfortable offering up part of that real estate to your marketing efforts, this might be a great way to optimize the promotion of a larger event to folks who are already fans of your company

Keep these tips in mind:

- Use clear and simple language. Include what, when, where, and how to register or attend.
- Make sure the tone matches the audience (professional vs. casual).
- Check spelling, grammar, and names—mistakes can make the organization look unprofessional. The best practice is to have someone unfamiliar with the event proofread your materials to help you find and correct errors before the campaign goes out to the public.
- Ask if your company has branding rules (like logo placement, colours, or fonts) and follow them.
- Being organized and respectful with timing is important. Don't send too many messages, but make sure people have enough notice so they can get your event on their calendar before it fills with other opportunities.

The tools mentioned earlier in this chapter can help you make materials that look clean and polished, even without a design background. Give yourself time to get familiar with the software and have fun learning all the features that you haven't discovered yet.

Promoting the Event

Once materials are ready, it's time to share them. As the Office Administrator, you may be asked to:

- Send out invitations by email or calendar invite – keep notes about your timing so that this can be reviewed during the debriefing process
- Post updates to social media – as was mentioned previously, carefully time these and space them out so

folks stay interested and engaged. Consider developing a dedicated **hashtag** to add searchability to your posts for future reference.

- Print and post flyers in common areas
- Send reminders a few days before the event

Remember – the key to promotion is to get folks excited about what is to come! Don't give away too much before the event occurs.

10.6. Presentation Skills Refresher

You've had a course on public speaking, and you've had to make several presentations throughout your Office Administration program, so the items discussed in this chapter are to serve as reminders of the skills you already have. And to help you realize how they can be applied to event promotion and marketing.

Putting Your Best Foot Forward

While you may not be the one standing in front of the camera recording a social media post, you are likely going to have to create the post or edit an existing one for your boss. There are several tips for helping you do so in a way that will make your event look really enticing.

- To start with, make sure the promotional material tells a story. Your campaign (series of posts, emails, flyers) should flow from beginning to end with a consistent message.
- The materials should have a consistent look (this is where templates and themes come in handy) regarding font, colour, and imagery. It helps to create distinct graphic elements for the event and use those in every single piece of promotion.
- Limit how much text you have on an image or poster. This will also allow you to make the font large enough for the person in the back of the room to see the information from afar.

Check out this brief video to show you examples of some of the items mentioned above. While this is specifically about presentations, the overall message is applicable to promotional materials of all types.

The video below has some great design ideas. Again, the focus is on PowerPoint, but don't forget – you can use PowerPoint to create single slides, which can be printed as a poster or flyer or saved as a .jpg to embed in an email campaign. You do not have to learn new software to create impactful marketing materials. Use what you know!

10.7. Key Terms

Key Terms

- **Audience:** the intended target for a marketing campaign/event.
- **Hashtag (#):** symbol used in social media that is followed by keywords used to tag a post and make it searchable.
- **Marketing:** the activities a team engages in to promote an event.
- **RSVP:** répondez s'il vous plaît (French), please respond (English).

10.8. What's My Role?

The Office Administrator's Role

Like in other aspects of event planning, you may not be directly responsible for creating the marketing and promotional materials. If you're lucky enough to work for a large corporation, they will likely have a marketing department whose sole purpose is to generate the materials discussed in this chapter. If you are working for a smaller business, you may be wearing all of the hats and have to show off your design skills regularly.

What you will absolutely be expected to do, however, is keep track of the marketing and promotion attempts. You'll be responsible for keeping notes of the advertising schedules, have copies of any contracts or records of payments stored in a safe place (this is when that folder structure will come in handy), and be aware of any campaigns that are out in the world so that you can answer questions from stakeholders as they come in through the phone or other office communications.

CHAPTER 11 - EVENT PLANNING - SPEAKERS & SESSIONS

Chapter Overview

11.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Explain the concept of scale in terms of event planning.
- Identify the different types of speakers.
- Determine what type of session meets your event needs.
- Explain possible interactions with speakers before, during, and after events.

11.2. Bringing Ideas to Life

You and your team have decided on a theme or topic of your event, and now it's time to work out the details. Those details include things like where the event will be hosted, who will be speaking, and what kind of sessions will be the main focus of your event. The next few sections of this chapter will teach you more about how these things all fit together.

Considering Size (or Scale)

It's important to know how large an event is going to be (its **scale**) so that you can accurately estimate what size venue you need to reserve, how many sessions you'll need, and what kind of invited speakers you want to include. The challenge, however, is that you may not know what size event space you need to reserve until you determine what kind of sessions and speakers can/will attend. And sometimes those decisions are tough to make until you know how many people are going to attend. But you have to tell the folks who have been invited some kind of detail (like location and at least a little bit about what to expect) before they decide to spend money on your event.

It's a bit circular, isn't it?

Important Considerations

Before we can decide on who is speaking and what the session structure will be, we need to consider a few things:

- *Number of attendees*: Are we inviting 20 company leaders for a planning retreat? Or are we planning to have the most membership in the Society for Neuroscience (upwards of 35,000 people)?
- *Event Duration*: How long will this event be? A weekend is suitable for a corporate retreat, but a science conference may need to last an entire week.
- *Event Type*: Casual workshops, Corporate retreats, and industry conferences all have different needs.

Those three things are factors to consider when we mention scale.

Where to Host

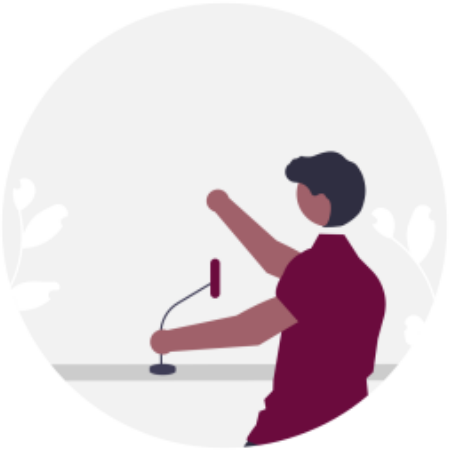
We will discuss all of the necessary components to consider in the following sections, but let's start with **the venue and** the location where your event will be held. Because event spaces are not always easy to find, this is likely the first decision that will need to be made once you've determined the type of event, how long it will last, and how many people you anticipate hosting.

As the Office Administrator, you are not likely to be the one who makes the decision about a venue, but you're going to be the person in the office who narrows down the options and presents them to the decision maker. You will need to contact event spaces and find out what they have to offer.

The professionals at whova.com wrote a great article outlining key considerations to make when looking for an event venue.

11.3. Selecting Speakers

Don't you think that speakers are necessary for every event? Even a small birthday event likely has someone giving a toast! That person is a **speaker** (someone who gives a speech), and they should be chosen carefully. Who would you want to say a few words if it was your birthday being celebrated at the office?



Types of Speakers

The real focus of this chapter, however, will be larger events – where the goal is either Education or Energy (remember a few chapters ago when we were talking about themes?). For those larger types of events, the planning team will need to consider a variety of speaker types:

- **Keynote** – the person who gives the most important speech. Sometimes, an event is large enough to have two keynote speakers, one to open the conference and one to close it.
- **Workshop/Session leaders** – these folks are often considered experts in the field and have knowledge to share with the attendees.
- Panel members – a **panel** is a group of folks often sitting on a stage and engaging in a question-and-answer period about a specific topic that is moderated by a respected person in the field.

Some of the key components to consider, according to Vayner Speakers (2025,) when choosing who will be the honoured keynote speaker are:

- Expertise and Relevance: Do they have the respect of your audience? Is their expected talk topic relevant to the event's theme?
- Engagement Style: Watch videos of their previous speaking engagements to determine if their style matches your audience's needs and attention span.
- Availability and Fee: Keynote speakers generally do not talk for free. Understanding how much you have budgeted for speaker fees will help narrow down the list of speakers that you recommend to the team. Also – check with their agent to ensure they're available during your event.

While it is expected that you will be paying an honorarium to the Keynote Speaker, Workshop/Session Leaders and Panelists are often attending the conference as knowledge seekers as well as being speakers, so the team could consider waiving their registration fee in exchange for their service.

Crowdsourcing

Another great tool for choosing speakers is the feedback form you give to event attendees. An open-ended question could be: "Do you have recommendations for speakers for next year's conference? If so, please share their names (and social media handle if you know it) here:"

When you are reviewing the responses from the feedback surveys to compile them for the debriefing session, you can start a spreadsheet for the next conference with a "Suggested Speakers" tab. Share that file with the

members of the team so that they can review it and begin to fill in the information and get planning for the following year.

“Conference speaker” by Undraw, Undraw License

11.4. Planning Sessions

You know where the event will be held, you have an idea of how many folks are going to be in attendance; you have the Keynote speaker's contract signed, and folks have written proposals for sessions they would like to host and sent them in with their registration forms. This conference is starting to take shape!

How do you decide what kind of sessions to hold? What will engage the attendees and make them feel like they have their money's worth?

Conference Session Types

There are four major types of sessions at an industry conference:

- **Keynote** – this is usually held at the beginning of the conference and is the only option for attendance at the time.
- **Breakout sessions** – these are smaller sessions where a presenter shares information about a specific topic in-depth. It is not usually interactive and is often occurring concurrently with several other sessions. Attendees choose one of the options to attend in a time frame. At most large conferences, the breakout sessions are offered more than once so that folks can attend several topics that interest them.
- **Workshops** – these sessions are better suited for smaller events where attendees are encouraged to engage in hands-on learning. This style offers the opportunity to engage with other attendees and the presenter.
- **Panel Discussions** – These are a great option for really large events where there just isn't enough space or time for all of the breakout sessions that folks would like to attend. The panel give an opportunity for several folks to talk about a common topic and share their knowledge with many attendees. They are usually led by an informed moderator who can keep the conversation on topic.

Schedule Considerations

When planning the conference flow, especially if you have several days to consider, it is important to balance session length. For instance, rather than having one long session that lasts the entire morning, break it up into three (3) hour-long breakout sessions with five or six topics that are presented in each block. Attendees rotate between the sessions to see three different speakers. See below for a sample of what that might look like for a conference hosted by IAAP – International Association of Administrative Professionals:

Figure 11.1 – Sample options for concurrent sessions at a fictitious conference for Office Administrators.

Source

OpenAI. (2025). *ChatGPT.* [Large language model]. https://chat.openai.com/chat

Prompt: Can you please give me a sample of six breakout session topics for a conference hosted by the International Association of Administrative Professionals?

11.5. Communication & Support

One of your main roles during a conference will be to provide support for the folks who are speaking at the event. There is no way to determine exactly what that involves as the needs of individuals are specific to that person, but it helps to be prepared with a list of possibilities.

This article, found on LinkedIn does a great job of highlighting some of the items summarized below.

Before the Event

Once your team has an agreement with the speakers, it is a good idea to make sure that they have a copy of anything that was signed. You should also work with them to make sure they have accommodations arranged and assist if needed to make those arrangements.

The team should determine the speaker's audio-visual needs. Do they need a projector for slides? Are they going to bring their own microphone? Do they want items printed to hand to participants? Are there any other special requests that will enhance the experience of the speakers and/or the attendees?

Your team should provide the speaker with a copy of the conference schedule as far in advance as possible.

As a general rule – workshop leaders and panellist will make their own transportation arrangements to and from the conference. But sometimes, they may ask for recommendations regarding travel if they are not familiar with the city where the conference is being held. Sharing that information may fall on your to-do list.

It is worth considering taking the time to develop a Speaker Information Form template that is part of your Document Toolkit. You can customize it for each conference and use it as a tool to gather information from and share it with your speakers.

During the Event

While the conference is occurring, it is a good idea to check in with the speakers at least one day before they are scheduled to present. You will want to make sure that they are aware of the schedule and be prepared to answer any questions they might have. One person from the Conference Team should be selected as the speaker contact so that all speakers and special guests know who to reach out to for any concerns during the event.

On the day of their session, the Speaker Contact should ensure that all of the room requirements are taken care of and any other special requests (handouts were printed and placed in the proper room) are handled. It is common courtesy to ensure that there is water available near the front of the room should the speaker need it during their talk.

Another great idea to consider is having a Hospitality Room. This is a space in the conference center that is reserved for speakers, special guests, and the conference planning team to relax away from the crowds. If the budget allows, you could have catering arranged in this room so that speakers and guests do not have to

arrange for their own snacks and meals. This room should be staffed at all hours and locked overnight to ensure that any items inside are secure.

After the Event

Once their speaking engagement is complete, showing appreciation for their time is key. How you show that appreciation is up to your Event Team. You could consider a group dinner with all the speakers, a swag bag with items donated by vendors, or a social media appreciation post.

It will be important to follow up with the speaker a short time after the event to gather their feedback. Remember when we discussed 360-degree evaluation in Chapter 7? Gathering feedback from the speakers/moderators is part of that process. Tailor the questions to their experience to ensure a response. Make sure to ask them if they'd be interested in returning in future years. You could even share feedback you received from attendees about their talk if you have collected it at the time.

11.6. Key Terms

Key Terms

- **Breakout session:** learning session where a subject matter expert is sharing knowledge with an audience, usually lecture-style
- **Keynote:** the most important speech, usually given to all attendees at once in the largest room available at the venue
- **Panel member:** subject matter expert invited to talk with a group on stage in a moderated conversation
- **Scale:** how large an event is going to be
- **Session leader:** subject matter expert who shares information on a given topic with conference attendees in smaller groups
- **Speaker:** someone who gives a speech at an event
- **Workshop:** interactive session with subject matter expert leading attendees through a learning activity
- **Venue:** location of an event, could be a conference room within your building, or a conference center in another town

11.7. What's My Role

The Office Administrator's Role

As with most situations covered so far, the Office Administrator is not making the decisions about who will be speaking or what sessions will be held for a conference. Your responsibilities will lie more in the realm of gathering information about possible speakers and sharing that with the conference team. You may be responsible for communications with the speakers before the conference. You will be responsible for organizing and storing any files (contracts, handouts to print, etc.). You will be responsible for ensuring things are running smoothly during the conference. Afterward, you will likely be handling the follow-up communications with the speakers, panellists, and moderators.

As we've mentioned several times, your organizational skills and clear communication will be very valuable when working with the speakers.

CHAPTER 12 - EVENT PLANNING - PROGRESS REPORTING

Chapter Overview

12.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Explain the difference between a progress report and a project summary.
- Demonstrate knowledge about the contents of a progress report.
- Explain the importance of regularly updating a project's progress to the project team.
- Demonstrate how to deliver bad news effectively.
- Explain how frequently reports might be requested.

12.2. Progress Reporting

Let's revisit a project you've been working on to help the executives at Sunny Horizons to illustrate some points for this chapter. . . You were tasked with organizing the employee training records for HR in Chapter 9, and now they want to know how things are going. They're asking for a progress report.

Why Progress Reporting Matters

Progress reporting is the process of updating folks who are not directly involved in the project to know how things are going. In the Planning phase, you would have developed a timeline that had goals for meeting milestones. The **Progress Report** is your chance to let others know whether or not the project is on track to meet those goals/milestones. This is often the main part of the Monitoring phase of a project, which arches over several of the main phases of project management.

The goal of progress reporting is to do regular check-ins to make sure that there are no major snags in a project's progress. And if there are challenges, they can be addressed before they become problems. A progress report keeps everyone on the project team informed.

If you were to report on your progress with the employee training records organization project, you could report things such as:

- What have you accomplished so far?
- What are you currently working on?
- What do you expect to have completed before the next report?

You write a progress report to inform a supervisor, associate, or customer about progress you've made on a project over a certain period of time. The project can be the design, construction, or repair of something, the study or research of a problem or question, or the gathering of information on a technical subject. You write progress reports when it takes several weeks or even months to complete a project.

Functions and Contents of Progress Reports

In the progress report, you explain any or all of the following:

- How much of the work is complete?
- What part of the work is currently in progress?
- What work remains to be done?
- What problems or unexpected things, if any, have arisen?
- How is the project going in general?

Progress reports have several important functions:

- Reassure recipients that you are making progress, that the project is going smoothly, and that it will be complete by the expected date.
- Provide recipients with a brief look at some of the findings or some of the work of the project.
- Give recipients a chance to evaluate your work on the project and to request changes.
- Give you a chance to discuss problems in the project and thus to forewarn recipients.
- Force you to establish a work schedule so that you'll complete the project on time.
- Project a sense of professionalism to your work and your organization.

Timing and Format of Progress Reports

In a year-long project, there are customarily three progress reports, one after three, six, and nine months. Depending on the size of the progress report, the length and importance of the project, and the recipient, the progress report can take the following forms:

- **Memo**—A short, informal report to someone within your organization
- **Letter**—A short, informal report sent to someone outside your organization
- **Formal report**—A formal report sent to someone outside your organization

Organizational Patterns or Sections for Progress Reports

The recipient of a progress report wants to see what you've accomplished on the project, what you are working on now, what you plan to work on next, and how the project is going in general. In other words, the following three sections are key in any progress memo or progress report:

- Work accomplished in the preceding period(s)
- Work currently being performed
- Work planned for the next period(s)

Revision Checklist for Progress Reports

As you reread and revise your progress report, watch out for problems such as the following:

- Make sure you use the right format.
- Write a clear opening paragraph reminding your recipient of the project you are working on and that you are making progress on that project.
- Use headings to mark off the different parts of your progress report, particularly the different parts of your summary of work done on the project.
- Use lists as appropriate.
- Provide specifics—avoid relying on vague, overly general statements about the work you've done on the final report project.
- Be sure to address the progress report to the real or realistic audience—not your instructor.

12.3. Documenting Progress

What Makes a Good Progress Report?

As mentioned in the previous chapter, what's most effective in a **progress report** is providing clear information that is timely, relevant and solution-focused. You are not expected to provide detailed information about every single detail. This is a higher-level report that provides the most relevant facts. A **project summary**, on the other hand, would be a more detailed article that goes into a little more depth about the process of the project. A progress report is like a snapshot, while a summary is like a video.

If you are supporting a team that is working on a very large project, with many folks providing progress reports, it would be helpful to everyone involved if you were to create and share a template that they could use to provide their progress report. Consider this document another to add to your Document Toolkit. You can create the template to have all the relevant sections that your company expects; then, the team members can simply fill it in as appropriate.

Progress Report Components

As outlined in the previous section, a progress report could take the form of a memo, a letter, or a formal report (all documents that you have lots of practice creating). The main portions that you would need to include are the date the report is being made, the project being reported on, the name of the person creating the report, which components are being reported on, and how close they are to completion. It is important that progress reports use clear communication regarding the status of the project tasks.

Click on the image above to access a sample Progress Report Template from Word.

12.4. Preparing Information with Impact

As with most of the topics we've covered in this book, as the person supporting an executive or an executive team, you are usually in the background instead of the forefront. Progress reporting is no different. Your responsibilities will center mostly around gathering, organizing, and then formatting the data that your boss will share with their team.

Sharing Good News

What you can do to ensure that your boss is able to present the most impactful progress report is to anticipate what they'll need. If you have been sitting in meetings to take minutes, you will know what is expected. For instance, is the team expecting budget updates? Do they want to know attendance projections? Are you expecting to see samples of what the deliverables will look like? You can remind your boss of these things as they are in the process of giving you information to include in the report that you will prepare on their behalf.

The video below shares some excellent tips for making your report very impactful, from the information included to its visual appeal.

Video: "Progress Report: How to Write, Structure, and Make It Visually Attractive" by Piktochart 👉 All-in-one visual communication tool [14:33] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Communicating Challenges

While the goal is for a progress report to share the great news that a project is running on time, within budget, and exactly as expected – sometimes there are hiccups that must be shared with the team. Knowing how to include those less-than-stellar updates in the progress report is a valuable skill. There are some key behaviours to consider when sharing bad news.

1. Be prepared – while it may be preferable to avoid a difficult conversation, it's better to face the challenge head-on.
2. Be honest about the situation. Most folks will admit that they would prefer to be told that something is not as expected than to find out on their own through less-than-ideal circumstances.
3. Keep the tone neutral and unemotional.
4. Propose solutions – this shows the stakeholders that you have given thoughtful consideration to how you can recover from this experience.

Another factor to consider is who needs to know. Is this an internal challenge that only the team working on the project needs to know about? Or is this something that needs to be shared with the entire stakeholder body?

12.5. Report Frequency

How Often Should We Report?

You could do a quick internet search and get conflicting reports on how often progress reports should be made. All of those resources will likely agree on the frequency with which progress reports are made, but this depends on the size of the project and the phase of the project you're in.

This blog shared by Planview.com does a great job of explaining in detail what is summarized below.

Most projects will need progress reports on at least a monthly basis. If the project is shorter term, you may need to provide weekly reports. For a project like an international conference, because the planning starts right after the previous conference ends, you would likely provide monthly reports to start and then move to weekly reports about two months before the event begins. Once the team has moved to the conference site to begin set-up and preparations, it would be wise to have a daily/nightly meeting to update the whole team on how things are going.

We discussed a variety of communication tools in previous chapters, and progress reporting is no different. While you may be asked to prepare formal reports for those monthly and weekly updates, by the time a project gets to the point of requiring daily updates, the team may choose to use more quick-access technology like Slack, shared Word documents, or instant messaging. Those quick response tools can be convenient, but it is important to make sure that the actual progress is documented. So, use tools that the team is already comfortable with and use on a regular basis rather than introducing something new for the sake of novelty.

12.6. Key Terms

Key Terms

- **Progress report:** document created to update team members on the progress of a project, can be created monthly, weekly, or daily
- **Project summary:** a detailed report that provides more depth than a progress report, usually provided after the project is complete

12.7. What's My Role

The Administrative Professional's Role

It sounds like a broken record at this point, but like with every other aspect of supporting a project team, your role with progress reporting is supportive! You'll be gathering information, making sure your executive is presenting their progress on the expected timeline, and ensuring that the reports they provide are as accurate as possible. You may be asked to create and provide access to templates to ensure consistency in reporting across departments.

Your skills with document organization, formatting, and attention to detail are very important in progress reporting.

CHAPTER 13 - EVENT PLANNING - BUDGETING AND SPONSORSHIPS

Chapter Overview

13.1. Chapter Introduction

Learning Objectives

By the end of this chapter, you should be able to:

- Define a budget.
- Discuss how to create an event budget.
- Outline the items to consider when creating an event budget.
- Discuss tips for creating an event budget.
- Define event sponsorship.
- Identify the approach to secure sponsors.
- Recognize sponsors and incorporate them into your event.

13.2. Event Budget

HEATHER BEECROFT

Simply put, a **budget** is an estimate of income and expenditure for a set period.

Budget Basics

Related to your event planning project:

- **Income** – the money your company has provided to you for the event + any money from sponsors or donations.
- **Expenditure** – the expenses you incur to plan and execute the event.
- **Duration** – the period used for the event and the time spent planning the event.

When creating a budget, you will start with an estimate of all income and expenses. The first time you run an event, you will have to do your best to guess amounts for income and expenditures. Once you are into a repeat event, you will be able to use the previous event's amounts as a place to start.

Once you begin to receive more information and more quotes, you will be able to refine and revise your budget. Sound familiar?

Everyone has some experience with budgeting; you may track your personal finances on a weekly, monthly or yearly basis to help you reach your financial goals. If you have planned a wedding or other large event, you probably used a budget to stay on track, or if you've completed a home renovation, you probably had a budget and received quotes from different vendors to complete some work.

This video from ProjectManager on YouTube has some great tips for creating a project budget.

> Video: "How to Create a Project Budget – Project Management Training" by ProjectManager [3:06] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

Creating an Event Budget: Where to Start

When creating an event budget, you must have a high-level plan. It is also important that you know what your source of income is and that you know approximately how much money you have to spend on the event.

Sources of income could include an allotted amount of money from the company you are working for, donations, sponsorship, and registration fees (if applicable). Knowing your event plan or requirements for the event will help you understand what expenses need to be considered when creating your budget. Those items include things like speaker **honorariums** (a fee you pay to have someone provide a keynote address), rental fees for rooms, catering costs, and swag bag expenses (some items may get donated by sponsors, but you might have to pay for actual bags and/or ribbons, etc.)

When working on your event budget, any **surplus** (leftover money) should be minimal, and there should not

be a **deficit** (overspent money). Using estimates that are as accurate as possible will help you stay on track when budgeting.

How to Master Your Event Budget by Eventbrite

Items to Consider

To get you started, the following items are some things you should consider when creating an event budget. This list is generic, and many more items need to be included to create a complete budget for your particular event.

- *Venue* – room rentals, parking expenses, security, electrical fees, security.
- *Food/Catering* – meals, breaks, refreshments, corking/service fees, tips.
- *Rentals* – tables, chairs, linens, stages, audio/visual, set-up/tear down, delivery fees.
- *Décor* – balloons, signage, florals, room decorations, table centrepieces.
- *Transportation* – Uber, taxi, bus, train, flights – for guests and speakers.
- *Gifts/Awards* – swag bag, speaker gifts, thank you gifts, raffle prizes, awards.
- *Administrative* – insurance, marketing costs, printing, planning fees, postage, invitations, permits, apps/software, staffing.

13.3. Creating an Event Budget

There are plenty of items to consider when creating and monitoring an event budget, so it can sometimes seem overwhelming. The following few tips can help keep you focused and on track.
1

Prepare your *preliminary* budget with estimates (best guess):

- Get your estimates in writing if possible – many venues offer detailed pricing breakdowns of all services they offer including catering, audio visual services and room costs.
- Get confirmation of what is included – for example, when booking a room is the cost of tables and chairs included, is there a podium and sound system, is a projector and laptop included, is water and glassware provided for tables, does WiFi come with the room booking?
- Review bills and check that everything is included – don't pay any deposits or bills until you confirm all inclusions are noted
- Include set up, tear down and freight costs

2

Revise as necessary

- Save revisions to your budget as you go along
- Consider keeping different versions of your budget as you adjust it so you can go back to a previous version if necessary (remember those tips in the section about naming conventions?)
- Your final budget will include your estimates, actual costs, and the **variance** – is the difference between your estimate and actual costs

3

Determine what is actually doable

- Not all great ideas can be fit into every budget
- Be realistic about what you can accommodate with the money you have to spend
- Create a priority list if needed

4

Customize an Excel template

Creating a well thought out budget can be a lot of work – start with a pre-made template and customize it to fit your requirements
5

Consider your options

- There are plenty of ways to save money – be creative to get the most out of your budget.

- Approach sponsors if you need more cash – be careful as you may risk crossing business ethical lines, so consider asking for in-kind donations to help defray the costs of your event

13.4. Event Sponsorship

If, after creating your budget, you realize that you need extra cash for your event, think about bringing a sponsor on board. A sponsor can provide much-needed cash for your event in exchange for something that is of value to them.

Event Sponsorship Basics

An **event sponsor** is a company that supports an event, usually by providing funds, in exchange for something valuable. Oftentimes, this "something valuable" comes in the form of increased brand exposure, access to attendee data, speaking opportunities at the event, or discounted event tickets (Moore, 2024).

Event sponsorship goes beyond financial donations; sponsors could donate food, prizes, room rentals, audio-visual support, marketing and media support – the list goes on and on.

For more information about the types of event sponsorship, please review the following:

- The Ultimate Guide to Event Sponsorship by CVENT
- The Ultimate Guide to Event Sponsorship by Bizzabo

Finding a Sponsor

Finding event sponsors isn't difficult, as almost any business could be a potential sponsor. When thinking about an event sponsor, it is important to keep your theme and intended audience in mind. Assume you were planning an event for a company specializing in childcare, and the theme for the event was "Play Time." Which would make a better sponsor: Rogers Wireless or Toys R' Us? Who would be a better strategic partner for that same event: Michaels Craft Store or Labatt Brewing? Rogers Wireless and Labatt may want to give you money (great!), but it's important to consider the optics when accepting sponsorship funds. Perhaps Labatt could support the event by being the named sponsor for an evening social event, and they could provide the beer. Rogers Wireless could provide a stress ball or coupon code to put in the swag bags.

Approaching a Sponsor

The following link to a post on The Sponsorship Collective provides additional information about why companies sponsor events, how to choose sponsors, how to create a sponsorship proposal, and other important information.

Video: "Get More Sponsors For Your Events" by Skift Meetings [2:59] is licensed under the Standard YouTube License.*Transcript and closed captions available on YouTube.*

13.5. Sponsor Recognition

When planning an event, sponsor recognition needs to be built into several aspects of your event. Sometimes, it may be appropriate to simply mention your sponsors during a closing speech at the event or to note their donation beside a prize or in-kind item that they donated – other times, larger gestures are required.

Some simple yet effective ways to recognize sponsors include (but are not limited to):

1. *Website* – providing links to the sponsor's website, providing a company bio, highlighting their sponsorship or donation, including business logo
2. *Program* – Provide an advertisement for the sponsor's company in your program, including their logo, and have a page that lists and acknowledges sponsors within the program.
3. *T-shirts* – placing the sponsor's logo on event T-shirts
4. *Preferred seating* – having a special table for sponsors during dinners and events
5. *Free tickets* – let sponsors attend your event for free
6. *Podium address* – thank your sponsor during a large podium address and mention their donation
7. *After the event, gift and follow-up letter* – formally thank your sponsor and send them a token of your appreciation.

This article by Jenny Shupert (2025) highlights some great ideas to improve sponsor recognition.

13.6. Key Terms

Key Terms

- **Budget:** an estimate of income and expenditures for a set period of time.
- **Income:** money that comes in, either through registration fees or sponsorships.
- **Deficit:** you overspent the available funds.
- **Duration:** period of time.
- **Estimate:** a best guess about cost based on previous experience or research.
- **Event sponsor:** an entity that provides financial support for an event in exchange for recognition of some sort.
- **Expenditure:** expenses incurred during an event.
- **Honorarium:** fee paid to speakers at an event.
- **Surplus:** leftover money.
- **Variance:** the difference between an estimate and an actual cost.

13.7. What's My Role?

The Administrative Professional’s Role

While the Marketing and Accounting team may likely do most of the heavy lifting in terms of approaching and signing on sponsorships for an event, your help is crucial to ensuring that contracts are stored, receipts are written and dispersed, and budgets are shared among all interested parties.

Once again, the Administrative Professional’s attention to detail, time management, and expert document organization will be key to the success of an event budget.

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Version History

This page provides a record of changes made to the open textbook since its initial publication. If the change is minor, the version number increases by 0.1. If the change involves substantial updates, the version number increases to the next full number.

Version	Date	Change	Affected Web Rage
1.0	April 10, 2024	Publication	N/A
2.0	April 16, 2025	Overall Changes to this edition include: • Project Management content was restructured from the original OER. • "What's My Role" sections added to each chapter. • Office administrator point of view added where appropriate. • Removed H5P elements from project management section • Chapters 7-13 chapters added for event planning material • Case Study – Sunny Horizons, Inc. added and referred to throughout the text.	Multiple