THE ONE MOMENT EVENTS CO

FREEBIE!

A step by step breakdown of how we manage our event management clients so they don't turn into full service!!!

Our event management service begins less than 12 months out from the wedding or as soon as the client hires us within 1 year before their wedding. We are not planning their wedding. We are giving them phased guidance and access to us at 4 touch-points (or quarterly) before the 60 day period where they can use our team as consultants to make sure they are not making any wedding planning pitfalls such as hiring a terrible dj on Craigslist or underestimating their catering or floral budget. The way this service works so efficiently is we are incredibly clear on what those boundaries are, what our responsibilities are, what their responsibilities are and maybe even more importantly - *what we will not be doing.* **Our event management clients are not allowed to email us**. Our event management clients can only communicate through their quarterly phone calls that are pre-scheduled or via their CRM software. This trains our clients to know that we have a *very* strict communication policy with event management and full/loose communication is for our partial/full service clients only.

The most important way we set ourselves and our clients up for success and a streamlined wedding process is by giving them the tools they need to be self-sufficient in their planning journey. Otherwise they are going to come to you and they are going to have a million questions and they will turn into-you guessed it-a full service client. And nobody likes to have the conversation where you tell your client they actually owe you 5x more than what they initially paid you or you end up doing the work for free because you feel bad and end up burnt out, exhausted and resentful of your client by the time wedding day comes.

So to help you get started, here is a free guide on how we do our event management step by step after we have booked a client! For a more in depth guide and access to our email templates, phase templates & checklists, onboarding process and more be sure to join our Mentorship group on Facebook where we will be discussing all of the below and more!

- **Intro Call and Onboarding**
  - Our intro call with a brand new client is typically done by our office admin but we also have a step by step by step breakdown in our Event Management guide if you are doing it yourself and want it to be super streamlined! After we have shown the client our planning software and reviewed our check in dates we ask them to go through the checklist and update all of the items that they have done, take note of questions they have for our next call and be sure to upload all of their current contracts, invoices & update due dates. After this call we schedule our first phase check in!
  - Automatic Email 1: This first email goes out after our onboarding call and is an automated checklist of items that we will be discussing during their phase 1 call. These are all early planning things - booked venue, vendors, color palette, ceremony timing etc. This review gives them basic information but also reminds them of what we will be chatting about on our first call and prepares them to be ready with information for us.

- **Phase 1 Check in Call (approximately 9-12 months before the wedding)**
  - On our first consultation call, we do a review of everything they have booked, their timeline overview, color palette and broad strokes of their event. Because this is an event management client they should know almost all of the details but might need some suggestions for vendors, will have a few questions about particular minutiae (where to book room blocks, when they should do their engagement shoot etc) but we also give them the general timeline of planning such as when to send save the dates, what information to put on those save the dates, who to book and when and send them off on their way with a nice big checklist of things to accomplish before our next chat. At the end of this call we also schedule our Phase 2 call!
  - Automatic Email 2: This second email goes out after our phase 1 call that covers the recap of our call, their action items and what we will be working on on our phase 2 call so they know what to expect! Any templates/guides of things that are repetitive also go out at this time (where to shop for Save the Dates, recommendations for attire companies etc.

- **Phase 2 Check in Call (Approximately 6-9 months before wedding)**

    - On this second check in call we are confirming they have done the items from our first call. We use our CRM software and custom made back of house templates to check things off but ensure they are also doing so in Aisleplanner. After we have covered the review of things they have done we see if there are any questions they have thus far (there usually are). After questions we tell them the next chunk of planning that needs to be done. Depending upon your process, you might want them to work on their design, finalize the last few vendors, ensure their guest list is up to date, send save the dates etc. After we give them the direction they need to be we schedule our phase 3 call!
    - Automatic Email 3: This 3rd email goes out after our phase 2 call. This email does the same thing as the last email, covering a recap of the call, giving them action items as well as due dates for things to come that we may not be helping them with (scheduling rehearsal dinners, wedding party purchasing/renting attire, determining hair & makeup schedule) as well as references to our notes in our planning software such as our packing list templates, photography shot list examples, gratuity guides, and other information they may have forgotten where to locate!
    - *The phase 2 call is the first official time you can really see if your client is following directions, doing what they are supposed to be doing and isn't actually a partial or full service client that just wants to pay less. If they don't have the things checked off from Phase 1 (and a legitimate reason for not having it done) it is time to have a serious talk with your client. This may seem a little harsh/early but if you take care of it now, it will not turn into a full service situation later! When you realize they don't have things done they are supposed to, you ask them if they need more time or if they need to upgrade their service. Those are the only 2 options. You can push your next call off until later to give them time to do it or they can purchase an a la carte phone call or upgrade their service based on necessity. If your client requests more than 3 additional phone calls, they need to upgrade to partial planning. Remember this is the time for you to tell THEM what to do not the other way around!*

- **Phase 3 Check In Call (Approximately 3-6 months before the wedding)**

    - Now we are in it! We are down to the wire and want the client to know that! There should be zero things from Phase 1 that are left to be done and should only be confirming/recapping things from Phase 2. At this point we do a more thorough confirmation of details & timeline such as ceremony order, reception order of events, guide them through invitation verbiage/ordering or sending them to a stationer, walk them through purchasing wedding day insurance, finalize their packing list, work on layouts and transportation schedule and tell them to start finalizing little design pieces and get them thinking about song selections for each part of their wedding. At this time we will also usually schedule the final walkthrough and ensure they start tracking their RSVPs as they arrive

    - Automatic Email 4: This email does a recap and ensures that they have almost every single detail finalized with their wedding. The only things left should be finalizing their layout, seating chart, rental counts, timeline details and load-in/load-out times.

- **Phase 4 Check in Call (Approximately 2-3 months out or right before)**

    - At this time their wedding is FINISHED! There should be no other planning details due except going through their final packing/production list. Confirming headcount or approximate headcount, confirming walkthrough date & time, determining who is in charge of what, having them start putting their guests at specific tables, and sending final layouts. IF they have everything done that they need to have done, we tell them to send an intro email to all of their vendors so we can take over officially from there. If they do NOT have everything done, we say that they need to have it done within 1-2 weeks (depending upon when this call is scheduled) and they can hand over the wedding after they finish their to dos. We are NOT responsible for their laziness or inactivity. If they didn't do the things they were supposed to when we told them, they will just have to do more work until they hand it over. This might mean instead of handing the wedding off to us at 60 days, they are handing it off at 30 days. Either way, this should just mena more work for them, not you. At this point you have given them every opportunity and all of the guidance and as long as you are following our phase call checklists or your own, you should feel confident in the service you have provided up to this point. After this call you will have them hand over the wedding to you and send the introduction email to the vendors.
    - Automatic Email 5: Confirming that you are taking over and that you cannot begin until they do the short list of things they need to do. You will also remind them of the details they need to work on (finalizing seating chart, making sure their packing list is up to date, song selections are done, day of stationery is ordered)

- **Final Countdown (30-60 days before the wedding)**

    - At this point we are now taking over the final details and confirming the things that have been planned with each vendor. We are lining up timelines, confirming head counts & layouts, working on the final production list and discussing any logistical details. We usually do at least 1 or 2 other calls with our clients at this point to finalize details and then we run the rehearsal and then the wedding day! Things we also review on this call might be gratuity guidance, our automatic checklists of things to remember about wedding day like who is taking home decor items, how to communicate to their family where they sit and when they need to arrive, final floral totals and any adjustments, final catering totals and any dietary restrictions, final packing list/decor items and how/where they do on the production list. Our clients wedding is for all intents and purposes completely planned at this point and there is nothing left for them to do! Now we have a wedding day that has been handed over in a neat little package for us to finalize details on and also where we have a bit more control over the vendors that have been selected and know that our clients have put in the intentional work to do things the right way! On wedding day, we always have a lead planner and a minimum of 1-2 assistants throughout the entire wedding. This hinges on the guest count, complexity of logistics & design, venue, location etc. When we are leading up to the wedding we have specific checklists & forms that we fill out in house after confirming details with each and every vendor that help us get verbal and written confirmation on things both 1 month and 1 week out. We send those details to our clients in an email so they are prepared for the day and then the wedding day runs smooth as butter! If you're doing this the right way, you should be investing a total of less than 20 hours in event management clients including both wedding day and prep/phone calls & walkthroughs. With this knowledge, be sure to calculate how much you are actually making with your event management weddings after you factor in your routine daily expenses, wedding day assistance and expenses. If you are making less than $100/hour you need to rethink your pricing or strategy! If you want to start making more than that and working a LOT less, be sure to check out our "How to Make Event Management Weddings Not Suck" Guide that includes all of our templates, email check-ins, phase checklists, tips & guides and more!