

Event Planning Workbook

Discovery, budget, scope, and BEO practice for Black Iris staff

Use fictional or authorized information only. Mark unknowns TBD. A request is not approval.

1. Discovery conversation

Capture what matters before designing the solution. Summarize; do not paste a raw transcript into the BEO.

Event / client

Event date

Primary contact

Decision-maker

Expected guests

Budget and scope

Purpose: what is this event meant to accomplish?

What would make the event feel successful?

Top three priorities

Fixed constraints

Flexible elements

Confirmed facts

Requests awaiting verification

Open questions, owner, and deadline

2. Budget-first plan

Protect the highest priorities, clarify what the budget includes, and show tradeoffs without inventing concessions.

Stated budget

Budget covers

Guest count basis

Estimate version/date

Priority 1 and protected outcome

Priority 2 and protected outcome

Priority 3 and protected outcome

Category	Confirmed / estimated	Amount	Assumptions / source
Space / rental			
Food			
Beverage			
Staffing / security			
AV / production			
Rentals / enhancements			
Tax / service / gratuity			
Contingency			
TOTAL			

Tradeoffs and alternatives

3. Plan-to-agreement control

- Correct client, event, date, and authorized decision-maker verified
- Reserved spaces and guest-count terms verified
- Access, guest, program, breakdown, and load-out times separated
- Included services and exclusions identified
- Food, bar, vendor, rental, and equipment scope verified
- Commercial terms read from authoritative records
- Every proposed change has a source, impact, owner, and decision deadline

Confirmed agreement

Client or vendor requests awaiting decision

Proposed staff arrangements

4. Training BEO

Use both date formats. Mark unknowns TBD. Keep confirmed facts separate from requests and proposals.

Event name

Event type

Date - short

Date - long

BEO type

Version / prepared by

Primary client

Day-of contact

Planner / coordinator

Guest count: expected / guaranteed / max

Spaces reserved

Event style

Event summary and success definition

Financial summary - authoritative sources only

Special instructions and deadlines

5. Run of show

Time	Location	Activity	Owner / staff cue

6. BEO operational details

Space-by-space setup

Food and buffet service

Bar service, cap, and change authority

Staffing roles and call times

Vendor directory and arrival plan

Logistics, access, storage, and removal

Floor plan references

Internal operations notes - decision / owner / deadline

Post-event notes
