

The Operational Edge

Event Planning and Debrief Framework

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Whether you are running your first business event or your fifth, the gap between an event that feels seamless and one that does not is almost never luck. It is preparation, the right decisions made early, and a clear process for reviewing what happened afterwards.

This framework follows the full planning and review cycle, from first conversation through to post-event debrief. Use it as a practical starting point and adapt it to your context. The phases do not need to be followed in rigid sequence: the discipline of working through them is the point.

The post-event debrief (Phase 6) is the stage most businesses skip. It is also the one that compounds the value of everything that came before it.

Phase 1: At Commissioning

1	Understand the client and identify who the main stakeholders are
2	Agree a draft budget and confirm who has final sign-off
3	Confirm why the event is being run and how success will be measured (delegate numbers, leads generated, relationships deepened, profile raised)
4	Clarify which decisions stay with the client and which are delegated to the event organiser
5	Establish which internal teams are involved (business development, marketing, operations) and identify a single internal point of contact
6	Agree the working relationship: closely collaborative with internal teams, or commissioned and stepped back

Phase 2: Building the Day

1	Work with the client to ensure marketing activity is active and on schedule
2	Manage delegate registrations, payments and tracking
3	Keep the client regularly informed of delegate numbers to support their marketing decisions
4	Meet with the client at agreed intervals to review progress and resolve any emerging issues
5	Maintain regular liaison with the venue as plans develop

Phase 3: Six to Eight Weeks Out

1	Send proforma logistics emails to speakers, session chairs, exhibitors and delegates (covering dietary requirements, access needs, accommodation and travel)
2	Confirm venue layout and produce a room plan
3	Build the microphone and speaker plan for the AV team
4	Draft local area information sheet for delegates (travel options, nearby food, accommodation)
5	Confirm any single points of failure (sole venue, sole catering option, sole AV contact) and agree contingency for each
6	If the event is annual: agree with the client whether it will run again next year, confirm a provisional date, and hold it with the venue

Phase 4: Final Week

1	Walk the delegate's actual arrival journey, on the ground where possible
2	Confirm all dietary and access requirements have been received, checked and communicated to the venue
3	Brief the on-site AV team in person with the mic and speaker plan
4	Confirm all proforma responses have been received and chase any outstanding ones
5	Prepare the on-day folder: full delegate list, accommodation and dietary details, blank Post-its for real-time notes

Phase 5: On the Day

1	The event organiser takes no fixed desk and no assigned tasks: your only role is to troubleshoot
2	Carry one folder with the full delegate list, accommodation and dietary details, and a supply of blank Post-its
3	Log any question or issue raised while you are mid-task on a Post-it; work through the list at each natural break rather than in real time
4	Ensure the client's commercial team are present as delegates and have no logistical role on the day
5	Talk to delegates, speakers and exhibitors throughout: the most useful feedback is gathered in conversation, not surveys

Phase 5: On the Day

6	If the event is annual: ensure the client promotes the following year's event before delegates leave
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Phase 6: Post-Event Debrief (within two to three weeks)

1	Finalise revenue figures and record outstanding expenses (allow time for the venue's final invoice)
2	Meet with the client to review: delegate numbers against target, any issues and how they were resolved, overall feedback
3	Collate any informal verbatim feedback gathered during the event itself, alongside any formal post-event survey responses
4	Review the Post-it notes logged during the event: which improvements are worth carrying into future events
5	Capture ideas for next year while they are fresh, small refinements count as much as structural changes
6	Agree the debrief summary as the starting document for next year's planning conversation
7	If not already confirmed: book the venue for the following year's event

A note on scope: every event is different and this framework will not map perfectly onto every situation. Use the phases as prompts, not as a fixed process. The discipline of working through them is what builds operational confidence over time.

About Suzanne Evett

Suzanne Evett is Regional Director for Get Ahead Berkshire. She works with growing businesses across the region, connecting them with the right Virtual Expert support at the right time. She has spent many years running complex events for organisations in the pharmaceutical and scientific sectors alongside building her own business.