Systems, tools and scaling

12 · The Business of Event Planning · about 11 minutes

CRM, proposals, contracts, payments, project boards, and when to hire your first coordinator.

Before you start

The event you are applying this to (real or the running gala example):

Date · guests · budget envelope:

Work through the objectives

1. Set up a lean operating stack

2. Document repeatable processes

3. Decide when to hire

Apply it: three decisions for your event

DECISION	WHAT YOU CHOSE AND WHY	OWNER / BY WHEN

Check your understanding

The first hire for most planners is

Documented processes matter because

Answers are on the lesson page after you take the quiz.

One line to remember