Fete & Figs Lead Planner Responsibilities for Event Management Clients

A client has booked and you have been assigned as lead planner... now what?

1. Set up a file in Drive for your new couple.
    a. Details spreadsheet
    b. Design doc
    c. Checklist spreadsheet
    d. Contracts folder
2. Reach out to the couple to introduce yourself, to ask them if they need any rec's for vendors, and to let them know about the drive file that you will be adding them to.
3. Add these dates to your calendar to reach out and check-in on their progress:
    a. 6 months: Send six month checklist
    b. 4 months: Send 4 month checklist
    c. 6 weeks: Set up final walkthrough meeting
    d. 4 weeks: Say hi, check-in, and say "Happy Wedding Month!"
    e. 3 weeks: Send details to all the vendors
    f. 2 weeks: Check in on last min details, mental status of couple
    g. 1 week: Re-send FINAL details to vendors and send a "Happy Wedding Week!" to the couple
    h. 2 days after wedding: Send a thank you to all the vendors and a thank you/congrats to the client and send them the link to leave a review.
4. At final walk through, you will gather all of the following that is not already in Drive:
    a. Vendor contracts
    b. Vendor contact info
    c. Processional lineup
    d. Important family names + any family issues to the sensitive to
    e. Basic timeline info
        i. You will put together the detailed timeline later, so don't spend too much time making them go through every single minute, but just get a rough idea of when they want the big items to take place.
    f. Sketch out the floorplan
        i. Reach out to the venue in advance to ask for a blank floor plan. If they cannot provide you with one, do you best to do a rough sketch of the room(s) and where they would like guest tables, food, bars, guest book etc to go.
    g. Walk them through the inventory list that the need to fill out in detail.
5. After the meeting, put together all the final details. Let me know when you have finished this so we can go through it together before you send it to the client to approve.

6. Once client has approved all the final details, send them to all the vendors and ask them to fill out the form stating that their times and info is correct or needs changes.
7. Once everyone has confirmed that all info is correct then you can send this FINAL LAST version to the client and again to all the vendors.
8. Week of the wedding:
    a. Run the rehearsal - make sure that everyone feels comfortable and knows when and where to be. I like to print out copies of the processional order and a condensed version of the timeline with my contact info to hand out to family and bridal party.
    b. Wedding Day -
        i. Text the bride in the morning to say “Happy Wedding Day!” and ask her if there is anything she needs.
        ii. Have faith that you have done a great job in planning and organizing and remember that NOTHING ever goes exactly as planned.
        iii. Your main job on the wedding day is to be happy, positive, calm, and quick on your feet. Inevitably, something will go wrong and it is very important that you can pivot and fix the problem without getting stressed or upset and hopefully without having to involve the client.
9. Send thank you email to the client with a link to submit a review on wedding wire.
10. Ask the photographer to send you the link to the photos when they are complete and add that link to the Photos Spreadsheet in Drive.