



# Event Planning

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# Business Plan

[YEAR]

Prepared By

John Doe



## *Dream fulfillment*

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Company

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# 1.

## Executive Summary

Business Overview

Objectives

Management

Mission

Keys to Success

Financial Highlight

## Business Overview



TIP

Welcome to the future of event planning! *Eventel*, *The event planning specialists* bring to the community of Portland a new breath of air in the event planning market. By combining old fashioned values, going the extra mile, and using cutting edge event-planning software, *Eventel* will lead the market providing the same quality results, every time.

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## Objectives



TIP

*Eventel* is a small business aimed at the big time. In order to reach its lofty goals, *Eventel* must focus on the mission behind the vision. It will take all the employees, owners, founders, and vendors daily living the vision that *Eventel* represents. The vision manifests itself in three ways:

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## Management



### JOHN DOE

Owner - [john.doe@example.com](mailto:john.doe@example.com)

Eventel will be lead by John Doe. Throughout her life, Ceece has been a planner, and only recently has she truly discovered that she could leverage her passion and skill into a business opportunity. While Greece was pursuing her undergraduate and graduate degrees, she was a chairperson for no less than four different student organizations. After receiving her MBA, she went to work for IBM as a project manager. It was her six years at IBM pursuing project management that truly honed not only her planning/ project management skills but also her interpersonal skills. After her fifth year at IBM, Greece began to get a bit too complacent and began dreaming of leaving to begin her own business. At first, it was a struggle to figure out what she could do on her own. One day on a long bike ride she had an epiphany, realizing that she should begin her own event planning company.

## Mission



TIP

In an ever-changing, fast-paced world, success is determined by good choices for lasting effects. Communication is essential. *Eventel* strives to be the best choice for clients by helping to ease their event planning burden. Through consistent, predictable professionalism, *Eventel* will ensure a worry and hassle-free event at a reasonable price.

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## Keys to Success



TIP

Our keys to success include the commitment to quality by every person who is part of the team. Each of us will be responsible to push ourselves to a higher level of professionalism in three areas:

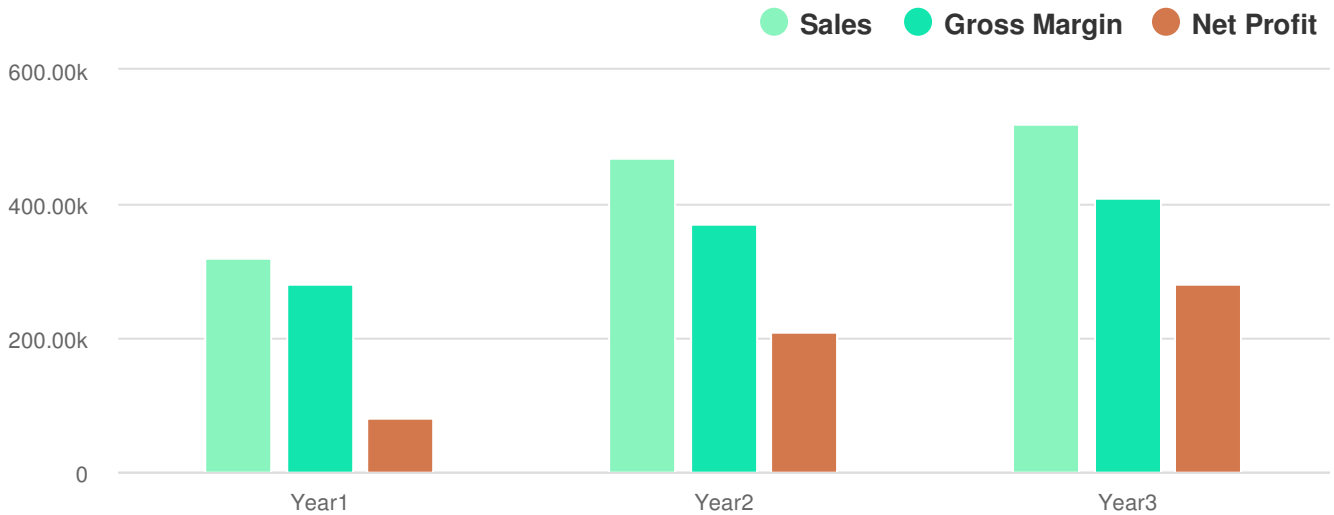
1. Consistent, accurate fulfillment of the client's

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## Financial Highlight

### Net Income & Gross Margin



Financial Year	Sales	Gross Margin	Net Profit
Year1	320000	280000	80000
Year2	470000	370000	210000
Year3	520000	410000	280000

# 2.

## Business Summary

About Business

Business Ownership

Start-up Summary

Location

Office Design



## About Business



TIP



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## Business Ownership



TIP

*Eventel* is established as a sole proprietorship with the intention of selling the business when it is established to one of the employees invested in the vision of event planning. All aspects of the business will be documented to ensure clients can count on the same results every time. It is these documents that will become the basis of ownership. The sole proprietor will use his or her

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## Start-up Summary



TIP

Through careful planning on the part of the founders, the startup costs for *Eventel* is minimal. It began as a home-based business with little overhead, and it continues to demand fewer outlay of funds as a service-based business. The start-up cost investment funds were assets saved from prior earnings by the owners who did event planning on a part-time basis before establishing

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## Startup Expense

Start-up Expenses	
Legal	[Amount]
Stationery etc.	[Amount]
Brochures	[Amount]
Consultants	[Amount]
Insurance	[Amount]

Start-up Expenses	
Rent	[Amount]
Research and Development	[Amount]
Expensed Equipment	[Amount]
Other	[Amount]
<b>Total Start-up Expenses</b>	[Total Amount]

## Start-up Assets

Start-up Assets Needed	
Cash Balance on Starting Date	[Amount]
Start-up Inventory	[Amount]
Other Current Assets	[Amount]
<b>Total Current Assets</b>	[Amount]
<b>Long-term Assets</b>	[Amount]
<b>Total Assets</b>	[Total Amount]
Total Requirements	

## Funding

Funding	
Owner Contribution	
Other	
<b>Total Investment</b>	

## Location



TIP

*Eventel* is located inside the city limits of Portland, Oregon. It is a home-based business. Most meetings with clients are conducted in social settings, such as restaurants, coffee houses, the client's home, facilities wishing to be used for the event, or over the phone. Although the demand has not yet reached its peak, *Eventel* will eventually move from its home base

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## Office Design



TIP

The company will maintain a high degree of professionalism. All offices are equipped with the latest in business technology, such as telephone systems, computers, fax



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# 3.

## Products and Services

Products and Services  
Competitive Comparison

## Products and Services



TIP

Although *Eventel* is primarily a service business, we also offer products to aid our customers in planning the event themselves. The following products are tools used inside our operation for the best possible results:

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TIP

The Party Pack is a complete kit for any party. It includes decorations, lighting effects guide, disposable theme cameras, cutlery, plates, napkins, cups, punch mix (or recipe), snack supplies (or recipe), tablecloths, theme music (where applicable), invitations, thank-you cards, and a step-by-step guide to planning, putting together, and hosting the event.

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### Party Pack

*Start writing here...*



TIP

These booklets include a calendar to map out the event, a step-by-step guide on what is needed for and how to put together a successful, worry-free event, resource information, popular refreshments with recipes, games, and tips to put their event in the record books. The events available include birthdays for all ages, meetings, retreats, parties, vacations, and special occasions.

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### Step-by-Step Guides

*Start writing here...*



TIP

Due to be released in June 2000, this cutting-edge tool will allow the client all the resources and visual aids for their event planning. They will be able to play with decoration themes, listen to theme music, design invitations, thank-you cards, and RSVP cards, use the interactive planning calendar, and much more. This software will bring their event into the millennium.

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### Event Planning Software

*Start writing here...*



TIP

This valuable guide acts as a review for all the resources located in the surrounding area. A ranking is given to the various services, such as caterers, decorators, disc jockeys, bands, and facilities. This manual gives the client the freedom of making a choice based on experience.

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## Resources Manual

*Start writing here...*



TIP

As a member of the Portland community, it is our mission to support our community. Ten hours each month will be devoted to training area students in event planning. This will aid them in planning proms, graduation parties, river clean-ups, homecoming, and other important events. This is a priority of *Eventel*. It will not be cut back as the business grows.

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## Event Planners Training Institute

*Start writing here...*

## Competitive Comparison



TIP

*Eventel*, although young, draws from the age-old tradition of going above and beyond what is expected, every time. Our systems for event planning have been drawn up, evaluated, practiced, worked, and reworked to ensure maximum efficiency while minimizing the possibility of error. We employ local vendors who have the same desire to be the best at

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# 4.

## Market Analysis

Market Segmentation

Customer Segmentation

Target Market Segment Strategy

Service Business Analysis



TIP

The following sections describe the market segmentation, strategies, and industry analysis.

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## Market Segmentation



TIP

The breakdown of the market for event planning falls in a wide, very diverse grouping. Individuals, as well as organizations, demand the services we provide. In order to provide the greatest depth of information, the market segments have been broken down into private and public organizations, and age groups.

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TIP

Private organizations make up the single largest portion of *Eventel*' client base. Private organizations such as businesses, corporations, and political parties host the most events on the largest scales, therefore, these events generate larger revenues per event. The majority of larger-scale holiday functions will fall under this segment.

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## Private Organizations and Businesses

Start writing here...



TIP

Government agencies host many events every year. *Eventel* hopes to alleviate the pressure of event planning for public employees. The second single largest segment, the public sector, can save money and give back to its community at the same time. These events are moderate in scale with middle to low revenues generated. Emphasis is placed on the visi

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## Public Organizations

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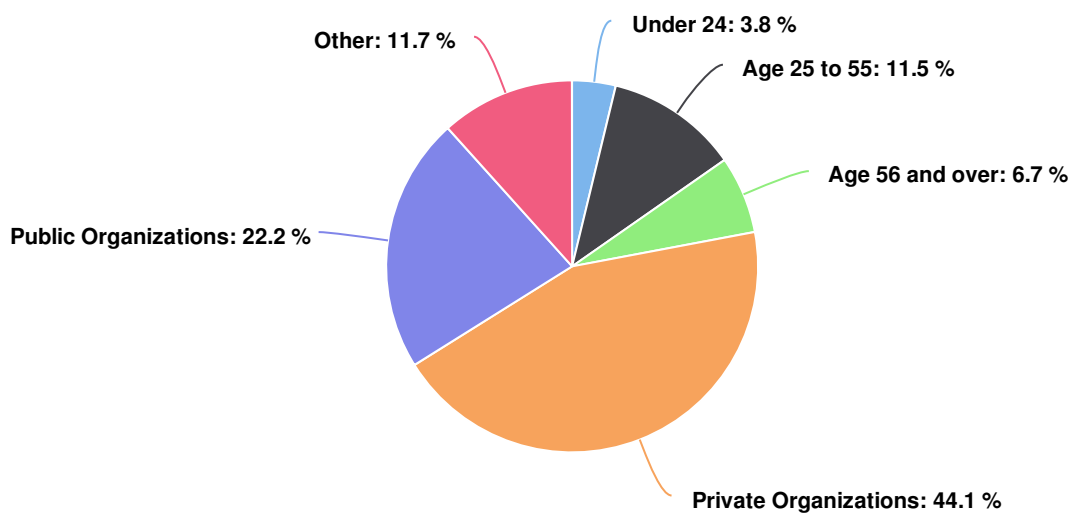
**Under 24:** Persons under the age of twenty-four (24) using an event planner are rare at best. We hope to tap the early college graduates who have begun their professional careers but have not yet started their families. These events will focus mainly on themes with moderate to high energy appeal. The revenues generated will range from moderate to high, depending on the event.

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## Age Breakdowns

Start writing here...

## Customer Segmentation



Potential Customers	Growth	Year1	Year2	Year3	Year4	Year5	CAGR
Under 24							
Age 25 to 55							
Age 56 and over							
Private Organizations							

Potential Customers	Growth	Year1	Year2	Year3	Year4	Year5	CAGR
Public Organizations							
Other							
<b>Total</b>							

## Target Market Segment Strategy



TIP

Our target markets are middle to upper-middle-class families, couples, individuals, or private and public organizations. We chose these groups because they are most able to afford event planners, and have the least amount of time to spare for event planning in general. Families demand attention, employees are overburdened, and overw

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## Service Business Analysis



TIP

*Eventel* is in a unique position of competition. We compete against hotels with conference facilities, conference centers, other event planners both on the large and small scale, persons within an organization who are assigned the task of organizing an event, and people who wish to organize their own events without the benefit of assistance. The benefits and c

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TIP

**Strengths:** On-site facilities, equipment, and support staff. Ability to transport and house persons for overnight stays. Able to internalize the costs of transportation and equipment.

**Weakness:** Often very expensive, impersonal, rely

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## Hotels and Conference Centers

Start writing here...



TIP

**Strengths:** Have been in the market longer, have established a reputation and client base.

**Weakness:** Reputation precedes them, no systems-based businesses designed to produce consistent results; focus on sm

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## Other Event Planners

Start writing here...



TIP

**Strengths:** Internalized cost of planning the event; able to add tiny personalized touches that have meaning within the group or family.

**Weakness:** Consumes time that could be spent on other things: don't have access to the best prices, services, and other needs

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## Employees or Persons wishing to do it themselves

Start writing here...

# 5.

## Marketing and Sales

Marketing and Competition

Sales Strategy

Sales Forecast

## Marketing and Competition



TIP

We have discussed our client base as being predominately middle to upper-middle-class individuals, couples or families, public and private organizations. We must then look at the needs of these markets and cater to them. We promise the same great results, every time.

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## Sales Strategy

Eventel deals with a diverse market of clients. Within each market segment, the closing of sales will differ. Each approach is described as follows:



TIP

Sales will be concluded one to two days after the end of the event. A follow-up phone call will be placed informing the client of the total cost, a number of attendees, and information about the billing packet that will arrive at their offices. Feedback forms will be included in these packets to ensure the client is being served as they deem appropriate. Form letter

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### Private and Public Organizations

*Start writing here...*



TIP

Sales will be concluded with a follow-up phone call one to two days after the event. The phone call will explain the total cost of the event, number of attendees, and information concerning the billing. Individual parties of any age group are placed on a billing cycle. Invoices will be sent out on the 25th of the month and will be due on the 10th of the following month

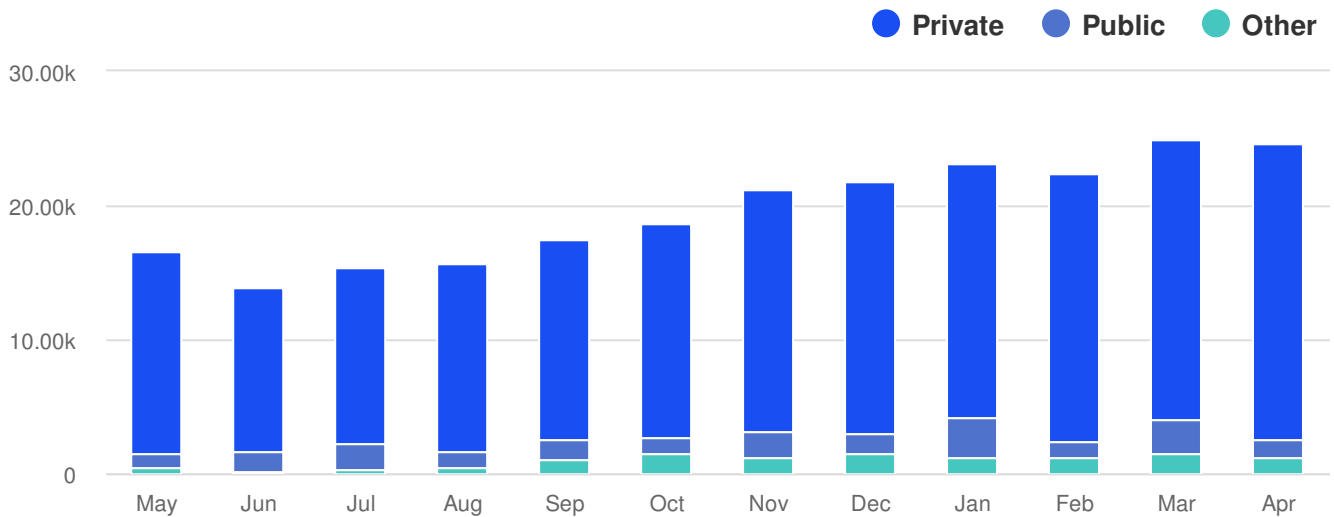
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### Individuals

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## Sales Forecast

## Sales



By beginning on a smaller scale, Eventel has the foresight to grow at a rapid pace to keep up with demand. We wish to maintain a steady rate of sales growth; however, we understand that sales of products and services will vary in different months. As noted in the graph and chart, rapid increases during the holiday season will boost sales, then allow that growth to level off at a steady rate.

Sales	Year1	Year2	Year3
Private	\$206,170	\$276,099	\$299,002
Public	\$113,185	\$178,490	\$193,000
Other	\$33,794	\$40,081	\$62,777
<b>Total Sales</b>	<b>\$353,149</b>	<b>\$494,670</b>	<b>\$554,779</b>

### Direct Cost of Sales:

Direct Cost of Sales	Year1	Year2	Year3
Private	\$312	\$330	\$355
Public	\$210	\$246	\$346
Other	\$132	\$151	\$189
<b>Total</b>	<b>\$654</b>	<b>\$727</b>	<b>\$890</b>

# 6.

## Management and Operations

Management Summary

Organizational Structure

Personnel Plan

## Management Summary



TIP

Information and expense details are presented in the subtopics Organizational Structure and Personnel Plan.

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## Organizational Structure



TIP

The management team within *Eventel* will be small in the beginning. The primary employee is the founder, who plans events, then contracts with caterers, decorators, disc jockeys, and bands to fill out the event. A contract labor site manager will be on hand to work the events as a liaison and vendor coordinator. Thus, there are two main employees with various levels of

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## Personnel Plan

Personnel Plan	Year1	Year2	Year3
Event Specialist	\$36,000	\$40,000	\$42,000
Site Manager	\$11,097	\$13,750	\$14,560
Other	\$8,947	\$9,560	\$10,000
Total People	7	8	9
<b>Total Payroll</b>	<b>\$56,044</b>	<b>\$63,310</b>	<b>\$66,560</b>



# 7.

## Financial Plan

Financial Plan

Important Assumptions

Key Financial Indicators

Break-even Analysis

Income Statement (5 Year Projections)

Balance Sheet (5 Year Projections)

Cash Flow Statement (5 Year projections)

## Financial Plan



TIP

Service-based businesses require little funds to start up, and as they grow and expand, fewer funds to maintain. The charts and graphs that follow will show that investment up front allows *Eventel* to function debt-free with little overhead. This gives *Eventel* a quicker break-even point and increased profit margins from the start. As *Eventel* grows, the debt-free philosophy will be

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## Important Assumptions



TIP

Tax rates are noted for information. We carry no loan burden that would be affected by these rates. What hits *Eventel* the hardest (but not nearly as bad as other service businesses), is the tax rate of 23.5%, which is nearly one-quarter of the total sales. As *Eventel* continues to grow, these numbers will be reference rather than influence.

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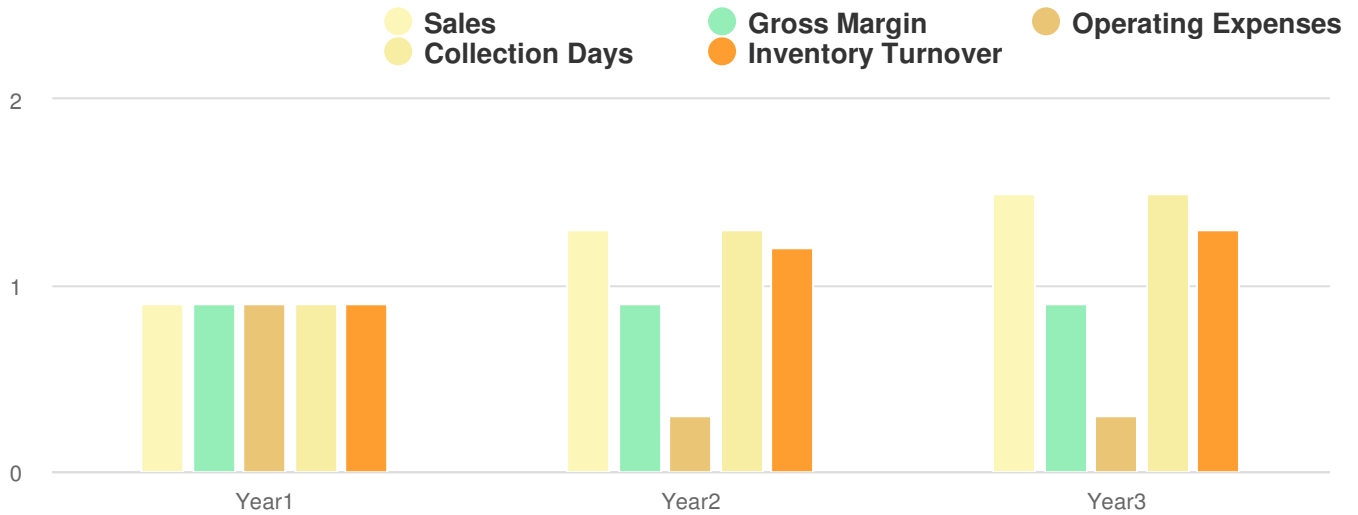
## General Assumptions

General Assumptions	Year1	Year2	Year3
Plan Month	1	2	2
Current Interest Rate	8.92%	8.92%	8.92%
Long-term Interest Rate	7.99%	7.99%	7.99%
Tax Rate	24.04%	24.04%	24.04%
Sales on Credit %	60.00%	60.00%	60.00%
Other	0	0	0

## Key Financial Indicators

The break-even point for Eventel is based on the assumption that we will produce 22 events per month and average approximately \$521 per event. In the current situation, we average more than this assumption for our public and private organization events. These currently make up 18 of the 22 average events hosted per month.

## Benchmark



## Break-even Analysis

The break-even point will appear more rapidly for Eventel than for other types of home-based businesses. Start-up costs are limited to minimal equipment, there is little or no staff to pay in the beginning, and contracted companies will handle any additional equipment required for the planned events.

Break-even Analysis	
Monthly Units Break-even	22
Monthly Revenue Break-even	\$11680
<b>Assumptions</b>	
Average Per-Unit Revenue	\$521.00
Average Per-Unit Variable Cost	\$75.00
Estimated Monthly Fixed Cost	\$10,000

## Income Statement (5 Year Projections)

	Year1	Year2	Year3	Year4	Year5
Revenues					
Product/Service-A	\$151,200	\$333,396	\$367,569	\$405,245	\$446,783
Product/Service B	\$100,800	\$222,264	\$245,046	\$270,163	\$297,855
<b>Total Revenues</b>	\$252,000	\$555,660	\$612,615	\$675,408	\$744,638
<b>Expenses &amp; Costs</b>					
Cost of goods sold	\$57,960	\$122,245	\$122,523	\$128,328	\$134,035
Lease	\$60,000	\$61,500	\$63,038	\$64,613	\$66,229
Marketing	\$20,000	\$25,000	\$25,000	\$25,000	\$25,000
Salaries	\$133,890	\$204,030	\$224,943	\$236,190	\$248,000
Other Expenses	\$3,500	\$4,000	\$4,500	\$5,000	\$5,500
<b>Total Expenses &amp; Costs</b>	\$271,850	\$412,775	\$435,504	\$454,131	\$473,263
<b>EBITDA</b>	(\$19,850)	\$142,885	\$177,112	\$221,277	\$271,374
Depreciation	\$36,960	\$36,960	\$36,960	\$36,960	\$36,960
EBIT	(\$56,810)	\$105,925	\$140,152	\$184,317	\$234,414
Interest	\$23,621	\$20,668	\$17,716	\$14,763	\$11,810
PRETAX INCOME	(\$80,431)	\$85,257	\$122,436	\$169,554	\$222,604
Net Operating Loss	(\$80,431)	(\$80,431)	\$0	\$0	\$0
Income Tax Expense	\$0	\$1,689	\$42,853	\$59,344	\$77,911
<b>NET INCOME</b>	(\$80,431)	\$83,568	\$79,583	\$110,210	\$144,693
<b>Net Profit Margin (%)</b>	-	15.00%	13.00%	16.30%	19.40%

## Balance Sheet (5 Year Projections)

	Year1	Year2	Year3	Year4	Year5
<b>ASSETS</b>					
Cash	\$16,710	\$90,188	\$158,957	\$258,570	\$392,389
Accounts receivable	\$0	\$0	\$0	\$0	\$0
Inventory	\$21,000	\$23,153	\$25,526	\$28,142	\$31,027
<b>Total Current Assets</b>	\$37,710	\$113,340	\$184,482	\$286,712	\$423,416
Fixed assets	\$246,450	\$246,450	\$246,450	\$246,450	\$246,450
Depreciation	\$36,960	\$73,920	\$110,880	\$147,840	\$184,800
<b>Net fixed assets</b>	\$209,490	\$172,530	\$135,570	\$98,610	\$61,650
<b>TOTAL ASSETS</b>	\$247,200	\$285,870	\$320,052	\$385,322	\$485,066
<b>LIABILITIES &amp; EQUITY</b>					
Debt	\$317,971	\$272,546	\$227,122	\$181,698	\$136,273
Accounts payable	\$9,660	\$10,187	\$10,210	\$10,694	\$11,170
<b>Total Liabilities</b>	\$327,631	\$282,733	\$237,332	\$192,391	\$147,443
Share Capital	\$0	\$0	\$0	\$0	\$0
Retained earnings	(\$80,431)	\$3,137	\$82,720	\$192,930	\$337,623
<b>Total Equity</b>	(\$80,431)	\$3,137	\$82,720	\$192,930	\$337,623
<b>TOTAL LIABILITIES &amp; EQUITY</b>	\$247,200	\$285,870	\$320,052	\$385,322	\$485,066

## Cash Flow Statement (5 Year projections)

	Year1	Year2	Year3	Year4	Year5
<b>CASH FLOW FROM OPERATIONS</b>					
Net Income (Loss)	(\$80,431)	\$83,568	\$79,583	\$110,210	\$144,693
Change in working capital	(\$11,340)	(\$1,625)	(\$2,350)	(\$2,133)	(\$2,409)
Depreciation	\$36,960	\$36,960	\$36,960	\$36,960	\$36,960
<b>Net Cash Flow from Operations</b>	(\$54,811)	\$118,902	\$114,193	\$145,037	\$179,244
<b>CASH FLOW FROM INVESTMENTS</b>					
Investment	(\$246,450)	\$0	\$0	\$0	\$0
<b>Net Cash Flow from Investments</b>	(\$246,450)	\$0	\$0	\$0	\$0
<b>CASH FLOW FROM FINANCING</b>					
Cash from equity	\$0	\$0	\$0	\$0	\$0
Cash from debt	\$317,971	(\$45,424)	(\$45,424)	(\$45,424)	(\$45,424)
<b>Net Cash Flow from Financing</b>	\$317,971	(\$45,424)	(\$45,424)	(\$45,424)	(\$45,424)
<b>SUMMARY</b>					
Net Cash Flow	\$16,710	\$73,478	\$68,769	\$99,613	\$133,819
Cash at Beginning of Period	\$0	\$16,710	\$90,188	\$158,957	\$258,570
<b>Cash at End of Period</b>	\$16,710	\$90,188	\$158,957	\$258,570	\$392,389

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### 6. Real-time and Collaborative

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