Client Contact Report

Client:
Project:
Meeting Date & Location:
Client Attendees:
upstage Attendees:

<Client Name> Action Points

- Please…
- Please…

Whitewall Action Points

- To do…
- To do…

Minutes:

Experience

<Insert sub-section>

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<Insert sub-section>

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Insert sub-section>

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Insert sub-section>

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Digital

<Insert sub-section>

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Creative

<Insert sub-section>

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Design

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Budget Update Report

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Timeline

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AOB

Project

Debrief Meeting

Date

Agenda

1) Intent

2) Pre-event Comms Process

3) Communications & Marketing

4) Experience
    a. Experience
        i. Delegate
        ii. Speaker
    b. Production
        i. General Session
        ii. Non general sessions
    c. Technical management
    d. Live facilitation
    e. Guest flow management
    f. Venue
    g. Catering

5) Digital
    a. Platform
    b. Technical management

6) Creative

7) Design

8) Next steps

Project

Communications Update Meeting

Date

Agenda

1) Experience Update
   a. General Session
   b. Non general sessions
   c. Marketplace
   d. Logistics
   e. Staff infrastructure

2) Digital Update
   a. Platform
   b. Creative support
   c. Sub-section

3) Creative

4) Design

5) Timeline

6) Budget Update report
   a. Time used

7) AOB

Project: NAME
Venue: NAME
Date: DATE
Client: NAME

Key: ▮ Event Date ▮ Milestone ▮ Actioned

WHITEWALL

	Who	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15
Timeline V? - date		M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F	M T W T F

CLIENT/UPSTAGE MEETINGS
- Kick Off Meeting
- Logistics Steering Group Meetings
- Content Steering Group Meetings
- Internal 24 hour meeting
- Client Show and Tell
- Post-event Debrief

PRE-EVENT MARKETING/REGISTRATION
- List of invitees approved
- List sent to upstage
- List uploaded to broadshow
- Save the date email text approved
- Save the date email sent
- Registration website text approved
- Registration website tested
- Registration website live
- Invitation text approved
- Invitation sent
- Registration report sent to Client
- Social media campaign
  - campaign X
  - campaign X
  - campaign X
- Reminder 1 approved/Phone chase script created
- Reminder 1 sent
- Phone Chasing
- Reminder 2 approved/Confirmation Script created
- Reminder 2 sent
- Confirmation Calls
- Joining Instructions approved
- Joining Instructions sent
- Registration Closed
- RIFF List

VENUE
- Site visit
- Pay deposit
- Final numbers
- BEO 1st draft to venue
- BEO Meeting
- Cancellation deadline

CATERING
- Site visit
- Tasting
- Pay deposit
- Final catering numbers

ACCOMMODATION
- No fee cancellation date
- Confirm number of bedrooms
- Final rooming list/cc details from client

- Final rooming list/cc details to hotel

GUEST MANAGEMENT
- Confirm coach requirements
- Confirm coach destinations
- Contact numbers for coach drivers and brief

POST EVENT
- Post Event analysis e-mail prepared
- Post Event analysis e-mail approved
- Post Event analysis e-mail sent out
- Feedback form prepared
- Feedback form approved
- Feedback form distributed
- Summary/Analysis submitted

PRODUCTION
- Operators Meeting
- Speakers / Presenters Rehearsal

Section X – Project Management

Project Team

Total £ xx,xxx.xx

The above cost is based on our total fee of £ XX,XXX.XX with commission deducted. For this event we have estimated that we will receive £ XX,XXX.XX commission from the venue/caterer

Roles & Responsibilites

Account Manager / Director

- Facilitates the relationship between Whitewall and client team
- Ensures smooth transition between "sales" and "delivery", ensuring all key information regarding your business, brand, market, audience, objectives and program are understood by the project team
- Scheduling regular contact between the Whitewall project team and the client planning team to ensure there is a collaborative approach to the planning process
- Ensuring that key decisions are made on time so that project delivery stays on track
- To be present at all site visits and for the duration of the (event) to ensure successful delivery of all aspects

Senior Project Director / Programme Director / Project Lead

- Overall management of the project
- Main point of contact between Whitewall and client planning team
- Key focus on ensuring Whitewall team deliver excellence, and that our clients' professional reputation is enhanced as a result
- Ensuring all stakeholders and project components are tightly aligned with overall program objectives
- Responsible for driving return on engagement, objectives and investment across Whitewall remit
- Management of budget and other financial matters, advising on how best to invest available budget to deliver maximum return
- Creation and co-ordination of the full event schedule to include the auctioning of any client agenda change requirements. Ensuring that all changes are assimilated and fed into all necessary areas of the production.
- Responsible for making sure the Whitewall schedule always matches the latest client agenda.
- To be present at the event to ensure successful delivery of all aspects on the day.
- Reconciling all costs post event and presenting these to the client.

Senior Producer

- Creating meaningful connections between your content and your audience
- Developing program themes that provide structure and purpose
- Content development and theming, working with speakers and directing the "show" elements.
- Working with your speakers to weave their presentation style and content into the fabric of the program
- Sourcing and managing external speakers, performers and facilitators who can add real value to your program
- Managing the design and delivery of all electronic media ie PPT, Keynote, Video and Music.
- Collation and co-ordination of all conference presentations pre-event.
- Briefing stage management and ensuring that speakers are briefed and rehearsed onsite.
- Hosting briefing calls with speakers pre-event to run through the agenda, timings and key event logistics
- Ensuring the theme runs through all aspects of the experience – both on- and off-line
- Advising in the creation of any video or other multi-media material.
- Briefing stage management and ensuring that speakers are briefed.
- Advising on speaker requirements for both on-stage presenters and technical crew.
- Advising on "look and feel" for all plenary and seminar areas.
- Creating digital connections between the live event content and your online audience
- Using the program themes to develop a range of digital content that is purpose built for your social media platforms, including bespoke graphics to brand your online channels
- Working with your team to develop bite-sized content in the form of graphics and copy, relevant to the type of social media channel and their specific users
- Developing content to be scheduled outside of the live conference to increase online activity pre- and post-event
- Preparing content by capturing photos, speaker quotes and utilizing presentation content during rehearsals, allowing you to be the first people to share posts on hot topics and really shape the discussion taking place during the live show
- Monitoring social media activity from your online audience and track the impact your content is having, both in terms of engagement with your posts and with the audience's own generated content shared with their followers

Project Manager (Logistics)

- Responsible for all logistics elements of the project, including management of the guest management team, production of delegate materials.
- Management and contracting of any logistics freelance staff or sub-contractors involved in the project.
- Management and contracting of pre-event marketing and registration.
- Management and contracting of on-site registration.
- Liaising with clients for details of delegate attendee lists and to pass on to relevant parties.
- Liaising with client for details of delegate travel.
- Management and contracting of transport including creation of timetable spreadsheets.
- Holding, contracting and briefing transport manager, FOH Manager and ushers.
- Creating spreadsheets to track all transport requirements before handover to Transport Supervisor.
- Liaising with all department heads regarding staff support numbers and locations.
- Booking any crew accommodation.
- Briefing and co-ordination of ushers.
- Creating the overall schedules of usher teams and making sure everyone is in the correct place at the correct time including 24-hour reminder calls.

Project Manager (Production)

- Responsible for all technical aspects of the project, including technical production management, staging, lighting, audio-visual and multi-media.
- To liaise with the client team to ensure all client technical requirements are met.
- Negotiating contracts with all technical production suppliers to ensure the best value for money/quality of delivery for the whole event and client.
- Completion of full Health & Safety and Risk Assessments. To ensure all staff and suppliers adhere to any necessary safety requirements.
- Responsibility for all scenic design elements including stage design, audio and video content and all front of house branding and floristry.
- Management of any technical freelance staff or sub-contractors involved in the project.
- To be present at the event to ensure successful delivery of all aspects on the day.

Project Manager (Expo)

- Responsible for all logistical aspects of the Expo
- Management of Expo Hall contractor
- Working with client to generate an approved floorplan for event
- Creation of event exhibitor manual, providing technical spec and detailed logistics information
- Point of contact for sponsors pre-event
- Pre-event management and co-ordination of exhibitor and sponsorship packages
- On-site co-ordination of sponsors and exhibitors
- Liaising with venue around exhibition arrangements

Project Manager (Comms)

- Creation and management of on-line registration system.
- Creation, management and distribution of all e-mail & other correspondence.
- Responsible for liaising with client for details of delegate attendee lists to pass these lists on to relevant parties.
- Management of any telephone registration and telephone chasing.
- Creation of delegate materials, including printed invitations, delegate packs, badges, signs and other collateral.
- Management and contracting of on-site registration.
- Produce reports on delegate registration.

Project Executive / Administrator

- Administrative support for the all stakeholders.
- Creates and distributes minutes, timelines, client contact reports, schedules and contact list as appropriate.

Project Manager (Location & Catering)

- Responsible for negotiating, contracting and liaising with venues and/or caterers regarding all room space hire, accommodation, delegate packages and catering costs.
- Contracting and liaising with venue regarding all room space hire.
- Monitoring deposit payments
- Organising a tasting and creating all relevant documentation pre and post tasting.
- Arranging a BEO meeting with the venue one week before the event to run through all finalized details.
- Monitoring delegate numbers and contract terms and conditions in relation to releasing bedrooms and catering packages.
- Creating a Banqueting Event Order (BEO) for the venue to be guided by on the event days listing everything required for the event including room set ups, catering requirements and all timings.
- Hiring any furniture including from the venue, caterers and any other external suppliers.
- Liaising with all department heads regarding staff support numbers and locations.
- Booking crew accommodation.
- Confirming final numbers with the venue and any dietary requirements.
- To be present at the event to ensure successful delivery of all aspects on the day.
- Reconciling the location and catering budget for the final costs.

Project Manager (Accommodation & Delegate Management)

- Responsible for all logistics elements of the project, including accommodation, management of the guest management team, delegate transport (as stipulated within this proposal), catering and transport requirements for Whitewall management and crew.
- Creating rooming lists and liaising with hotel re VIP upgrades.
- Management and contracting of any logistics freelance staff or sub-contractors involved in the project.
- Management and contracting of on-site registration.
- Liaising with the client for details of delegate attendee lists and to pass on to relevant parties.
- Liaising with client for details of delegate flights.
- Management and contracting of Coach Company including creation of timetable spreadsheets.
- Holding, contracting and briefing Transport Manager, FOH Manager and ushers.
- Creating spreadsheets to track all transport requirements before handover to Transport Supervisor.
- Liaising with all department heads regarding staff support numbers and locations.
- Booking crew accommodation.
- Briefing and co-ordination of transport ushers and coaches.
- Ensuring all luggage brought in is labeled ready for its arrival at the hotel.
- Responsible for staff food, uniform and accommodation.
- Creating overall schedules of usher teams and making sure everyone is in the correct place at the correct time including 24-hour reminder calls.

Project Manager (Branding)

- Client point of contact for all branding requirements
- Creation of branding proposal, with recommendations of where budget is best spent to maximise impact
- Working with design & print partner to generate all required branding across all event spaces
- Submission of all artwork to client for approval
- Management of the print and production of all artwork
- Onsite presence to ensure correct installation and complete removal of all brand elements

PROJECT – Date

Internal Action Points – Todays date

Roles and Responsibilities
Sales-

Pitch Director-	Project Manager – Expo-
Senior Project Director-	Project Manager – Comms-
Account Manager-	Project Executive-
Programme Director-	Project Administrator-
Project Lead-	Studio Director
Senior Producer-	Creative Director
Producer-	Art Director
Project Manager – Logistics-	Motion / Graphics
Project Manager Production-	Designer

- **Why?**
- **Who?**
- **What?**
- **How?**

General
- Contact Sheet
- Schedule
- Timeline
- Review budget / Harvest budget & hours spent
- Review timeline
- Update Ops Database
- 24 hour and show and tell meetings – are they booked in?

General Session Production

Techical Management
- Contract a technical manager
- Contract a show caller
- Contract a stage manager
- Booking confirmations completed
-

Scenic Design
-

Lighting
-

AV
-

Video & Data Projection
-

Crew & Support
-

Non General Sessions Production

Techical Management
-

Scenic Design
-

Lighting
-

AV
-

Video & Data Projection
-

Crew & Support
-

Marketplace

Technical Management
-

Scenic Design
-

Lighting
-

Power
-

AV
-

Content

Video
-

Keynote & PPT
-

Music
-

Other
-

Logistics

Comms & Marketing
-

Location & Catering
- Read contract
- Site visit
- Cloakroom?
- Security?
- BEO
- Set up BEO
- Tasting (checklist)
- Tasting documentation

Guest & Delegate Management
- Hold/Contract FOH Manager
- Hold/Contract ushers
- Usher uniforms

Staff Infrastructure
- Staff Transport
- Staff Catering
- **Logs box**
- **Additional insurance required**
- **Additional travel insurance required**

Health & Safety
- Risk Assessments
- Method Statement
- Fire Safety Sheets

Project Team
-

Next Meetings:
Internal –
Client -

Digital

Creative and Design elements (pertenant to Ops team)

-

Platform

-

Elements

- Licencing
- Insurance
- Office Infra
-

Creative

- Thematic ideation
    - Iterations
- Theme development
- Story boards
- Brand ideation
    - Iterations

Design

- Storyboards
- Motion / graphics
- Presentation
- Elements
    - Licencing
    - Insurance
    - Office Infra