STANDARD OPERATING PROCEDURE

Event Planning SOP

Document no.	SOP-EVT-001
Revision	1.0
Owner	Event Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To plan events consistently from brief to execution, so nothing is missed on budget, timeline or vendor coordination before event day.

2. Scope

Applies to event coordinators planning corporate, social or private events from the initial client brief through the pre-event review. Day-of execution and vendor coordination have their own dedicated SOPs.

Definitions

Client brief	The initial document capturing the client's event goals, guest count, date, budget range and key preferences.
Run sheet	The detailed, timed schedule of everything that must happen on event day, used during execution.
Production schedule	The planning timeline showing when each planning task, deposit and vendor booking is due before the event.

3. Responsibilities

Event Coordinator	Builds the timeline and budget, books vendors, and keeps the client updated throughout planning.
Event Manager	Approves the budget and contracts, and signs off on the plan before it moves to execution.
Client	Approves the brief, budget and key decisions, and provides timely feedback during planning.

RACI matrix

Activity	Event Coordinator	Event Manager	Client
Capture the client brief	R/A	I	C
Build the budget and timeline	R	A	C
Book and contract vendors	R	A	I
Approve the final event plan	R	A	A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Client brief template
- Event budget spreadsheet
- Production schedule or planning timeline
- Vendor contact and contract tracker
- Venue floor plan
- Run sheet template

5. Procedure

Step	Task	Owner	Done
5.1	**Capture the client brief** Meet with the client to capture the event goals, date, guest count, budget range and any must-have elements, recording it all in the client brief template.	Event Coordinator	☐
5.2	**Confirm venue availability** Check venue availability for the requested date and capacity, and hold the space with a deposit or option per the venue's policy.	Event Coordinator	☐
5.3	**Build the initial budget** Build a line-item budget covering venue, catering, decor, entertainment and staffing, and share it with the client for approval before booking anything. **Checkpoint:** The client approves the budget before any vendor deposits are paid.	Event Coordinator	☐
5.4	**Create the production schedule** Build a production schedule showing every planning task, deposit due date and vendor booking deadline between now and event day.	Event Coordinator	☐
5.5	**Select and book vendors** Request quotes from vendors for each service needed, compare them against the budget, and book the selected vendors following the vendor coordination SOP.	Event Coordinator	☐
5.6	**Confirm the venue floor plan** Finalize the floor plan with the venue, including seating layout, staging, and any load-in or accessibility considerations.	Event Coordinator	☐
5.7	**Track deposits and payments** Track vendor deposits and payment due dates against the production schedule, confirming each payment is made on time to hold bookings. **Warning:** A missed vendor deposit deadline can cause a booking to be released to another client.	Event Coordinator	☐
5.8	**Update the client regularly** Send the client a planning update at each major milestone, such as vendor confirmations or floor plan approval, rather than waiting until questions arise.	Event Coordinator	☐
5.9	**Build the event day run sheet** Build the detailed, timed run sheet covering setup, guest arrival, program flow and breakdown, using vendor confirmations to set accurate timing.	Event Coordinator	☐

Step	Task	Owner	Done
5.10	**Confirm final guest count and details** Confirm the final guest count, dietary requirements and any last changes with the client by the vendor's final headcount deadline. **Checkpoint:** Final guest count is confirmed with the client before the caterer's final headcount deadline.	Event Coordinator	☐
5.11	**Hold the pre-event review** Review the run sheet, floor plan and vendor confirmations with the event manager before event day to catch any gaps.	Event Manager	☐
5.12	**Distribute the final plan** Send the finalized run sheet and floor plan to all vendors, venue staff and the client ahead of event day so everyone is working from the same plan.	Event Coordinator	☐

6. Quality checks

- The client approves the budget before any vendor deposits are paid.
- Every vendor booking on the production schedule has a signed contract on file.
- Final guest count is confirmed before the caterer's headcount deadline.
- The pre-event review is completed before the run sheet is distributed.

7. Records

- Client brief
- Approved event budget
- Production schedule
- Signed vendor contracts
- Final run sheet

8. KPIs

- Percentage of events planned within the approved budget
- Vendor booking deadlines met on schedule
- Time from brief to first budget approval
- Client satisfaction score after the event

9. Common mistakes

- Booking a vendor before the client approves the budget.
- Missing a vendor deposit deadline and losing the booking.
- Building the run sheet without confirmed vendor timing.
- Confirming the final guest count after the caterer's deadline.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

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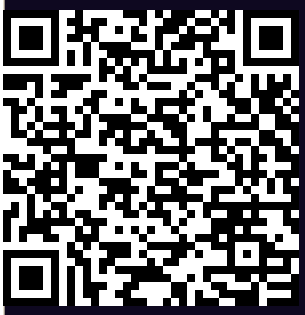

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