
STEP 1
MENU PLANNING**10 mins**

The Pantry
(What are you
working with?)

The Dining Room
(Who are you cooking
for?)

Event Goal Setting

Your Event's Secret Sauce

You've read the post, you get the drill: clear goals are the secret sauce to an amazing, stress-free event. Now, let's get cooking!

Just like a great chef, in events, you need your mise en place everything prepped, measured, and ready before you switch on the heat. This simple recipe is your chance to define your main objectives (your Hero Goal) and clearly list your success metrics (your Taste Test). If you can nail this quick prep, your event execution will be effortless. Ready to set the menu for success?

Maximum Budget:

What is the absolute maximum total budget? (This is your hard limit, not your target spend.)

Deadline:

What is the one deadline that is most likely to compromise the event's success if missed? This might be a vendor deposit due date or a mandatory conference start date.

The Attendees

The greatest pitfall in planning is diverting resources to a "fringe potential audience" who are only a small percentage of your expected attendance. **Trust this rule:** focus on delivering success for your core 70% audience. The fringe will often find their own way, and their needs can usually be met with simple workarounds, preserving the integrity of the main event experience.

● The Non-Negotiable Exception

The only time you absolutely must prioritise a small percentage is around accessibility and diversity. For an event to be truly successful, it must be authentically welcoming to all. Failing here creates a poor brand experience and alienates large portions of the market.

Primary Audience:

This is your core 70%. Who are they? (Be specific: job title, industry, stage of life.

Supporting Data:

What evidence do you have that confirms you have the correct audience? (past attendee stats, survey data, comparable events)

Secondary Audience:

The next most important group, or the next 20- 30% of your attendees. (Again be specific: job title, industry, stage of life.)

Supporting Data:

3 key motivators

What are the 3 biggest motivators that are likely to influence your audience towards helping you meet your goal. Make sure this aligns to your goal and not just ticket sales.

Primary Audience:

Secondary Audience:

Stakeholders

Aside from your attendees, your dining room is also made up of both internal and external stakeholders who are able to greatly influence the key goals of the event.

Identify your top 5 most important stakeholders (those who have the highest influence or interest in your event's outcome.)

Top 5 Internal

(e.g. Board, CEO, Sales Team, Finance, Manager.)

Top 5 External

(e.g. Sponsors, Venue Partner, Key speaker)

A Note for the Planner:

Think critically about these individuals now. We know that strong stakeholders sometimes exert pressure that can shift your carefully laid goals. In a separate, advanced resource, we will cover the strategy for managing these priority shifts. For this session, simply consider: How is this stakeholder likely to interact with the event, and how might their needs influence the final outcome?

STEP 2

INTO THE KITCHEN



10 mins

The Ingredients

(What You Need)

The Event's Name:

Event Type (Pick One): Personal, Commercial/Corporate, Fundraising

The 'Hero' Goal (The Main Course):

What is the one thing that, if you nail it, makes the whole event a win? (Be specific! No vague hopes allowed.)

Secondary Goals (The Tasty Side Dishes):

List up to two extra wins.

- Secondary Goal A:
- Secondary Goal B:

Success Metrics (The Final Taste Test):

How do you prove you hit the Hero Goal? (Needs numbers or clear, observable proof.)

Dietaries

Not everything always goes to plan and a great chef always has ingredients prepped for a setback.

List the top three potential risks that could stop you from hitting your Hero Goal, and the immediate, measurable action you'll take to mitigate the damage.

Risk (The 'Killer')	Severity (Low, Medium, High)	Contingency Plan A (The Immediate Action)
1:		
2:		
3:		

The Method (Your Speedy 5-Minute Blitz)

Examples (Goal Setting in Action)

Tips From the Clipboard (Why This Matters When Things Go South)

Mental Mise en Place (1 Min): Stop thinking about decorations and catering for sixty seconds. Just focus on the result you want.

The Core Fill (3 Mins): Attack the Hero Goal and Success Metrics. If you can't measure it, cross it out and write a better one. This is the part that saves you tears later.

The Sanity Check (1 Min): Read your Hero Goal out loud. Does it still feel right? If you're waffling, fix it now before it becomes a problem during execution.

Goal (Sales): To generate a minimum pool of qualified sales-ready leads who have actively engaged with the product's value proposition.

Measure:

- We collect contact details for at least 75 attendees who complete the "Request a Demo" form/survey.
- 60% of attendees scanned are classified as 'Qualified' (based on industry/title).
- The Sales team successfully books 15 follow-up meetings within 7 days post-event.

Goal (Fundraising): To maximise the net fundraising income generated on the night to directly support the current project's three-month budget.

Measure:

- The event achieves a minimum Cost Per Dollar Raised (CPDR) of \$0.25 (i.e., we spend 25 cents to raise every dollar).
- The total gross revenue from silent auction and raffles exceeds \$12,000.
- The final Net Profit from the event meets or exceeds \$55,000.

Having a clearly defined goal is your guardrail for when things get hectic:

Personal Events: This is your 'Politeness Shield'. When Aunt Carol insists on a string quartet when you clearly want a DJ, this sheet reminds you (and helps you explain gently) what your focus is and why. Keep calm and stick to the plan!

Corporate & Fundraising: This document is your 'Boss Buffer'. If the priorities suddenly pivot mid-event (and trust me, they will!), you have objective data to show management or stakeholders exactly what impact their new idea has on the agreed-upon success metrics. It's about keeping the business accountable to the original mission.

STEP 3
PLATING UP**1 min**

The Final Review

Your Goal Setting Checklist

- ☐ Defined the Maximum Budget hard limit.
- ☐ Identified the Critical Deadline that, if missed, compromises success.
- ☐ Clearly defined the Primary Audience (core 70%) and their key motivators.
- ☐ Confirmed that Accessibility & Diversity have been prioritised.
- ☐ Mapped the top 5 Internal and External stakeholders.
- ☐ Identified the 'Hero' Goal (the one win that makes the event a success).
- ☐ Set Success Metrics that are measurable (numbers or clear, observable proof).
- ☐ Listed the top 3 Risks to the Hero Goal & an immediate contingency plan for each.
- ☐ Completed the 5-Minute Blitz & verified the Hero Goal is still correct and clear.