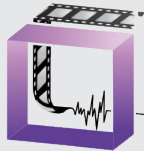


# THE EVENT PLANNER'S SURVIVAL GUIDE

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KEEP THE CRATE OPEN



# THE OPEN CRATE

COLLECTIVE

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# A LETTER FROM OUR FOUNDER

Dear Event Professional,

If you're reading this, you probably know that feeling -standing in a venue, looking at your event setup, wondering if you've thought of everything. Maybe you're there right now, facing an unexpected challenge, trying to figure out your next move. Don't worry. You're in good company.

Over the years, I've been involved with events from every angle - providing technical direction, managing full productions, and collaborating with incredible event planners. What I've learned is that successful events aren't about rigid roles or fixed procedures. They're about bringing the right expertise together at the right time, adapting to each event's unique needs, and working as one team toward shared success.





## *A Letter from Our Founder*

This guide isn't about telling you how things *should* be done - you've got your own expertise and approach. Instead, it's about sharing what we've learned from thousands of events,

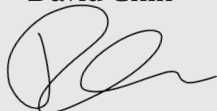
both successful and... well, let's call them "learning experiences." Because at the end of the day, we're all working together toward the same goal: creating exceptional events that exceed expectations.

And here's the truth:

An event isn't magic; it's skill, precision, and a team of hardworking individuals committed to success. At Open Crate, we handle all the small details so you can focus on the bigger picture. With us, you're not just getting an event—you're getting peace of mind.

Let's make every event extraordinary.

David Chin

A stylized, handwritten signature in black ink, appearing to read 'David Chin'.

The Open Crate Collective



## HOW TO USE THIS GUIDE

You're holding in your hands (or maybe viewing on your screen) the distilled wisdom of countless events, both the smooth-sailing ones and those that had us thinking on our feet.

This guide is your trusty sidekick, your go-to resource when you need a little extra support or inspiration.

First things first: this isn't a cover-to-cover kind of read (unless you're really into that sort of thing). Think of it more like a map. The table of contents is your key - use it to navigate straight to the sections that speak to your current challenges.

You'll notice some 💡 icons sprinkled throughout. These are your insider tips, the little nuggets of wisdom that can make a big difference. Keep an eye out for them.

The guide itself follows the flow of a typical event, from those early planning stages to the final post-event debrief.

## *How to Use This Guide*

But don't feel tied to that structure. If you're in the middle of load-in and need some wisdom, flip straight to that section. This guide is designed to work for you, not the other way around.

Most importantly, remember that this is a tool, not a rulebook. Every event is unique, and you'll need to adapt this advice to your specific situation. And if you ever need a little extra support, just give us a shout. We're always in your corner.

So, ready to make some event magic? Let's dive in!



## CHAPTER 1

### INITIAL PLANNING

#### G etting Started: The First 48 Hours

EVER NOTICE how the first two days after getting a new event are crucial? These hours set the tone for everything that follows. Let's talk about making them count.

THINK about your last client meeting. They probably came in excited, full of ideas, maybe even said they wanted something "simple." But here's what experience has taught us: "simple" means different things to different people.





A "SIMPLE PRESENTATION" could be:

- A sales team sharing quarterly results
- A CEO announcing a company-wide initiative
- A product launch for key stakeholders

EACH ONE NEEDS A DIFFERENT APPROACH. Not because one is more complex than the others, but because each has its own definition of success.

YOUR ROLE in these first conversations? Getting clarity on what really matters. When your technical team asks what you're trying to achieve, having solid answers helps them deliver exactly what your client needs.

💡 *QUICK TIP for Client Conversations:*

INSTEAD OF "WHAT kind of event are you planning?"

TRY "WALK me through how you want this event to feel."

. . .

## THE TIMELINE TALK

LET'S TALK TIMING - SPECIFICALLY, when key decisions need to be made. Because in events, time isn't just about the day-of schedule. It's about giving yourself room to make smart choices.

CONSIDER VENUE SELECTION. Looking at a space six months out gives you:

- Multiple venue options
- Time to solve technical challenges
- Flexibility with layouts
- Room to be creative with solutions
- Time to plan efficient use of resources

**TWO WEEKS OUT?** Now everyone's scrambling to make things work instead of making them shine.



## CHAPTER 2 VENUE & TECHNICAL PARTNERSHIP

### **N**avigating Venue Partnerships

**HERE'S something that can dramatically affect your event's success: understanding the venue's partnerships and policies, especially when it comes to AV services.**


**MANY VENUES WILL TELL you they have an "in-house" or "preferred" AV provider. What they might not mention is that you usually have options. Before signing that venue contract, let's talk about what this really means for you:**

## UNDERSTANDING Your Rights

- Most venues will allow outside AV companies
- Some charge fees for using external vendors
- Others try to mandate in-house services

HERE'S where your negotiating power comes in: the venue wants your business. Before signing any contracts, have an open conversation about:

- External vendor policies
- Associated fees
- Setup and strike times
- Power charges
- Loading dock access

 *Pro Tip: Compare in-house AV quotes with external options. In-house services often come with significant markups to cover their permanent venue presence. The savings from an external provider could more than offset any venue fees.*

## MAKING the Choice

WHEN EVALUATING in-house versus external AV:

- Get detailed quotes from both
- Compare equipment specifications
- Look at setup/strike fees
- Consider labor costs
- Ask about backup equipment
- Understand support policies

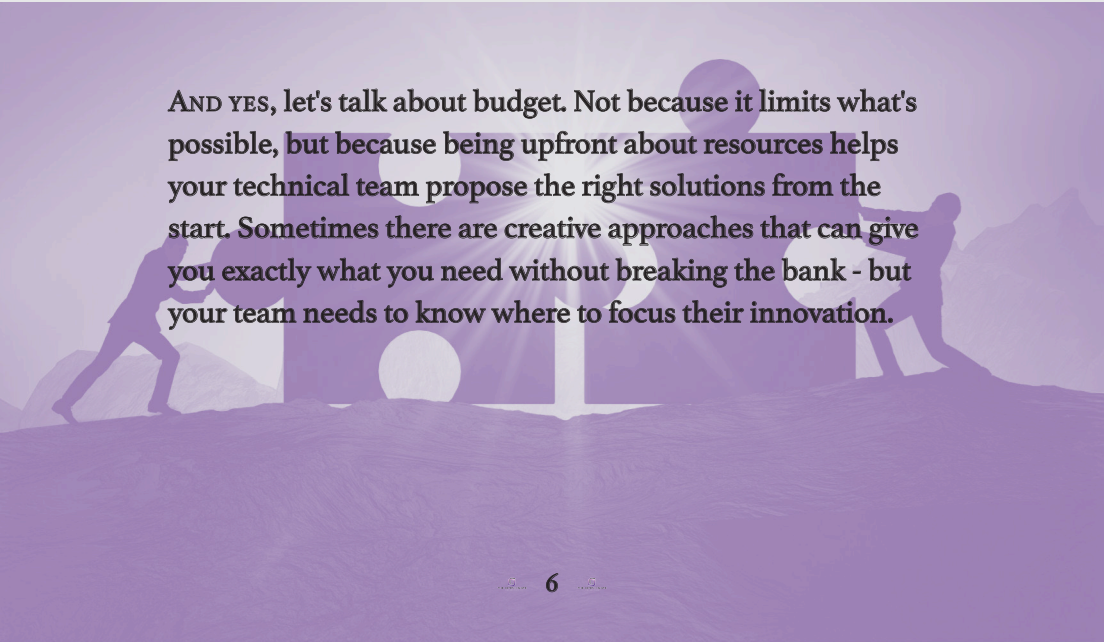


## **BUILDING Your Technical Partnership**

ONCE YOU'VE CHOSEN your AV partner, your next step is making sure they truly understand what you're trying to achieve. They don't just need specifications - they need context.

HERE'S what makes a difference in that first conversation:

- Share your client's expectations (not just technical requirements)
- Walk through critical moments in the program
- Discuss potential challenges you see coming
- Be clear about what success looks like for this specific event



AND YES, let's talk about budget. Not because it limits what's possible, but because being upfront about resources helps your technical team propose the right solutions from the start. Sometimes there are creative approaches that can give you exactly what you need without breaking the bank - but your team needs to know where to focus their innovation.



## THE TECHNICAL WALK-THROUGH

THIS IS where theory meets reality. When your technical team visits the venue, they're not just looking at power outlets and rigging points. They're envisioning how to transform the space into what your client needs.

THEY'LL CONSIDER THINGS LIKE:

- Where people will naturally focus their attention
- How sound will travel through the space
- Where to position control areas for minimal disruption
- How to handle cable runs safely and discreetly
- Where backup equipment should be staged

💡 *PRO TIP: If possible, schedule your walk-through during the same time of day as your event. Natural light can drastically affect technical decisions.*

## TURNING Discussions into Action

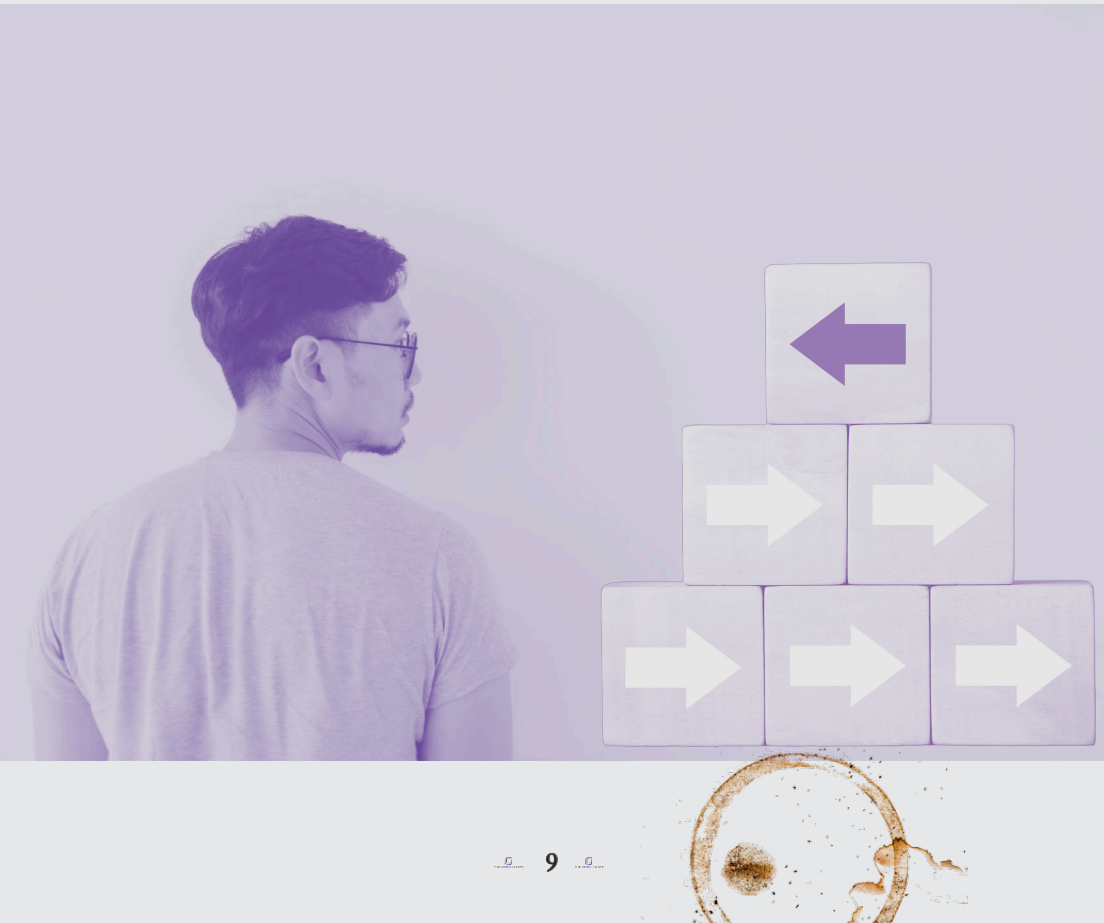
NOW THAT YOU'VE got your venue secured and your technical team aligned, it's time to get specific. Let's start with the schedule - not just show time, but the whole picture.



CONSIDER THIS TIMELINE BACKWARDS:

- When does your event end?
- When does it start?
- When do doors open?
- When does rehearsal need to happen?
- When does setup need to be complete?
- When can setup begin?

WHY BACKWARDS? Because each of these times affects what needs to happen before it. If your CEO needs to rehearse at 10am, everything needs to be ready by then - not just mostly ready but tested and working.



## CHAPTER 3 SCHEDULE AND SETUP

### **T**he Schedule Reality Check

HERE'S a conversation worth having early with your venue and technical team. If your event starts at noon, and the venue says you can get in at 6am, that might sound like plenty of time. But let's break it down:



## *The Open Crate Guide to Event Success*

### 6:00 AM: Venue Access

- Loading dock logistics
- Power distribution
- Basic safety checks

### 7:00 AM - 9:00 AM: Core Setup

- Cable runs (before anything covers them)
- Equipment load-in
- Initial system configuration

### 9:00 AM - 10:00 AM: System Testing

- Audio checks
- Display testing
- Lighting focuses
- Backup systems verified

10:00 AM: Rehearsal

11:00 AM: Final Adjustments

11:30 AM: Doors

SUDDENLY SIX HOURS doesn't seem so luxurious, does it?

💡 **PRO TIP:** *When a venue tells you setup time, always ask: "Is that exclusive access, or will other events be loading in or out during that window?"*



## MAKING Your Schedule Work

HAVING A SCHEDULE IS ONE THING. Making it work smoothly is another. Let's talk about how to keep everything moving efficiently.

### LOAD-IN LOGISTICS

THINK of load-in like a well-choreographed dance. Everyone needs to know their steps and timing. Your technical team typically leads this dance, because:

- Power and cable infrastructure needs to be established first
- Heavy equipment needs to come in before decorative elements
- Basic systems need testing before fine-tuning can start

💡 **PRO TIP:** WHEN OTHER VENDORS ASK, "Can we just start setting up our part?" - here's why the answer might need to be "not quite yet." It's not about territory - it's about doing things in an order that works.

## THE PRE-EVENT WALK-THROUGH

BEFORE YOUR TECHNICAL team starts loading in, do a quick space check. You're not looking for technical issues - your team will handle that. You're looking for:

- Clear access paths
- Clean loading dock
- Empty stage area
- Available storage spaces
- Working elevators

FIFTEEN MINUTES here can save hours of problem-solving later.

## SETTING Up for Success

ONCE SETUP BEGINS, your role shifts to:

- Keeping communication channels clear
- Managing vendor timing
- Handling venue questions
- Protecting the schedule
- Anticipating client needs

THINK of yourself as an air traffic controller - you don't need to fly the planes, but you need to make sure they all have clear paths to their destinations.



## SCHEDULE AND SETUP

. . .



## CHAPTER 4 EVENT EXECUTION

### R ehearsal Reality

HERE'S where your planning starts meeting real people. Rehearsals aren't just about practice - they're your first look at how everything actually works together.

YOUR TECHNICAL TEAM will be watching for things you might not even notice:

- The way your speakers naturally move across the stage
- How presentations look from different angles
- Where sound might need adjusting
- If lighting catches glasses or jewelry
- Whether confidence monitors are properly positioned

THIS IS EXACTLY when you want to discover these things -not during your actual show.

## SHOW DAY MINDSET

FIRST RULE OF SHOW DAY? Stay calm. Seriously. Your energy ripples through your entire team and even to your attendees. When you're confident and collected, everyone else follows suit.

THERE'S THIS SWEET SPOT, usually about an hour before doors open. Your space looks perfect. Your technical team has completed their checks. Everything's tested and ready. Take a breath - you've earned it. But also use this time to:

- Do one final walk-through
- Check in with your team
- Review any schedule changes
- Position your backup plans

LET'S talk about those backup plans for a minute. Not because things will go wrong, but because being prepared means you don't have to worry about "what if."

💡 **PRO TIP:** Work out simple hand signals with your technical team ahead of time:

- 👉 Volume up
- 👇 Volume down
- 👋 Hold/Stop
- 👍 Good to go

## WHEN THINGS GET Interesting

LET'S talk about those moments that aren't in any run of show - because they happen at every event. Maybe:

- Your presenter shows up with new slides
- Someone wants to add "just one quick video"
- The room temperature isn't quite right
- There's unexpected feedback during a speech

### HERE'S YOUR PRIORITY GUIDE:

- **Audio issues? Handle immediately**
- **Room temperature? A crowd will fix that. Give it a second.**
- **New content? Needs proper testing first**
- **Lighting adjustments? Wait for a natural break**

**YOUR TECHNICAL TEAM handles the actual fixes. Your job?**  
**Keep the program flowing and maintain the right energy in**



the room. Think of it like a duck on water - calm on the surface, even if there's some paddling going on underneath.

## READING the Room

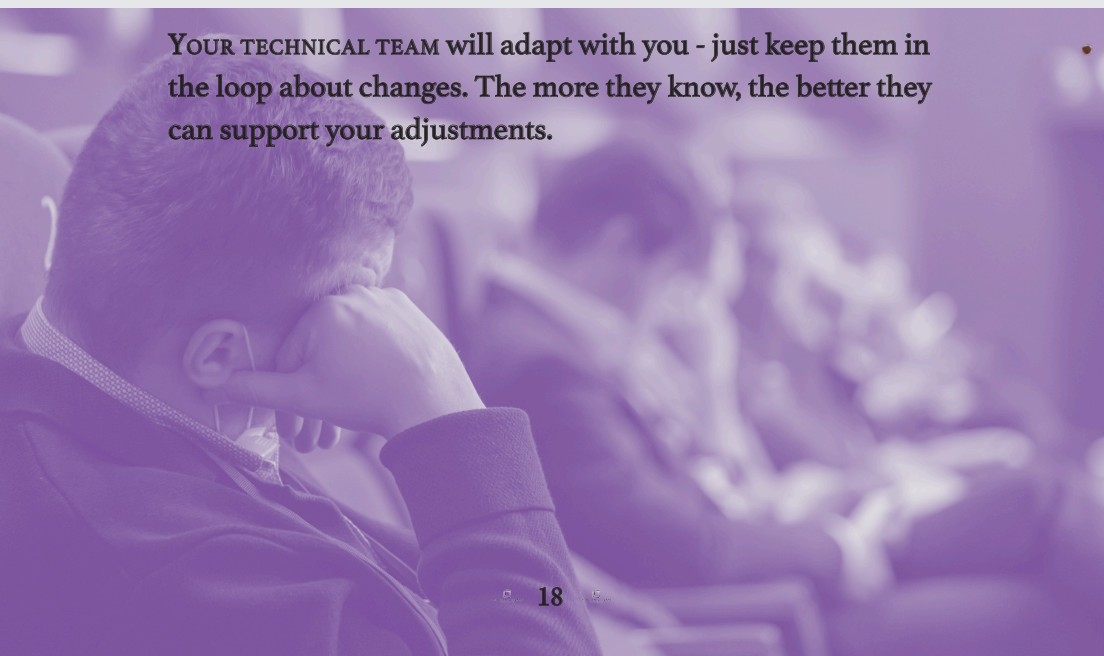
SOMETIMES THE BEST solution isn't technical at all. When your presenter is running long, or the room's getting restless, or the schedule's starting to slip - these are moments where your expertise really matters.

YOU MIGHT NEED TO:

- Signal a speaker to wrap up
- Call an impromptu break
- Adjust the schedule on the fly
- Rearrange program elements



**YOUR TECHNICAL TEAM** will adapt with you - just keep them in the loop about changes. The more they know, the better they can support your adjustments.



## THE FINAL HOURS

JUST BECAUSE YOU'RE in the home stretch doesn't mean it's time to mentally check out. Sometimes the most interesting moments happen near the end:

- A CEO decides to extend their remarks
- Someone wants an impromptu photo session
- The award presentation runs long
- There's "one last announcement"



## EVENT EXECUTION



## **CLOSING Strong**

YOUR EVENT MIGHT BE ENDING, but your technical team is gearing up for another critical phase: strike. Here's what you might not see happening behind the scenes - a carefully orchestrated process that's just as important as setup.

THINK about what's often happening during strike:

- Another event loading in for tomorrow morning
- Limited loading dock access
- Tired crew
- Late hours
- Overtime fees
- Venue curfews

YOUR TECHNICAL TEAM will have a specific plan for breaking everything down. Trust their process - it's about efficiency and safety, especially when everyone's tired.





## CHAPTER 5

### POST EVENT SUCCESS

#### **T**he Post-Event Sweet Spot

**HERE'S A PRO MOVE:** before everyone scatters, take five minutes with your key team members. Not for a full debrief - that comes later - but to capture those immediate impressions while they're fresh:

- What worked brilliantly
- What solutions we discovered
- Which challenges we faced
- What we might adjust next time

**YOUR TECHNICAL TEAM** has probably already started thinking about improvements for your next event - that's what good partners do.

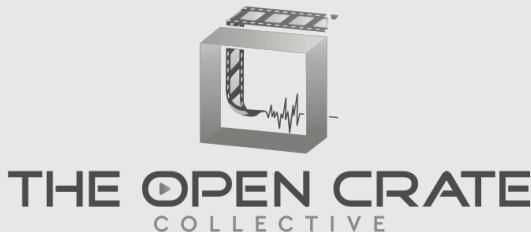
## **BUILDING ON SUCCESS**

SURE, we all love those perfect moments - when the crowd gasps at the reveal, when every cue hits exactly right, when everything runs smoothly. But you know what really shows an event's success? When your team is already excited about working together on the next one.

THIS IS where solid partnerships prove their worth. Each event builds:

- Deeper understanding of how you work
- More efficient communication
- Smoother problem-solving
- Stronger trust

AND REMEMBER, keep that crate open - to new ideas, to creative solutions, to better ways of working together. Because that's how good events become unforgettable ones.



## GETTING in Touch

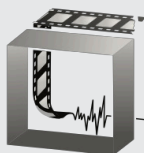
WHEN YOU NEED SUPPORT, have questions, or just want to bounce around some ideas, we're here:

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