

FIRST CHAPTER IN-PERSON DAMA DAY
EVENT GUIDE



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Glossary of Terms

Term	Acronym/ Abbreviation	Definition
DAMA-International®	DAMA-I	Data Management Association International, based in Washington, USA, is a volunteer-led not-for-profit organization established in 1980, promoting data management excellence worldwide.
DAMA Chapter		Independent legal entities, established as not-for-profit organizations, or with the proscription of no inurement for the board of directors, affiliated to DAMA-I
Chapter DAMA Day		Annual major event organized either as in-person or hybrid format, to create a space for knowledge sharing and networking around data management and best practices and trends.
Sponsor		Public or private organizations supporting the event either through funds or in kind, in exchange of pre-defined benefits.
Sponsorship Model		Definition of levels of sponsorship, including prices and benefits each level grants to the sponsor.
Event Concept		Definition of purpose, duration, date, target audience, theme, and high-level agenda structure.
Staff		Individuals supporting the event on site the day of the event. Could include organization team members, Chapter board members, volunteers and venue support people.
Attendees		Those individuals registered for the event either per purchasing a ticket or by entering a free pass code.
Participants		All the individuals at the event (attendees, speakers, DAMA Chapter Board members, special guests, staff) Number of participants is important to know to estimate cost for food, badges, lanyards, welcome kits, etc.
Proof of Concept	PoC	Testing of tools and processes defined (ticket selling platform, attendees checking in, satisfaction survey etc.)
Audio-visual services	AV	AV services refer to the equipment, technology, and technical support required to produce, amplify,

		display, and record sound and visuals during an event. They ensure that speakers are heard clearly, presentations are visible, and multimedia content runs smoothly — both for live audiences and, if applicable, remote or recorded attendees.
Program		Overall structure and content of the event — the big picture that describes <i>what the event includes</i>, its purpose, and the sequence of main activities over the full duration (e.g., all 2 days).
Agenda		The detailed schedule or timetable of the event — it tells <i>when</i> and <i>where</i> each specific item in the program happens.
Certified Data Management Professional	CDMP®	DAMA International® certification program, comprised of three levels of certification: Associate, Practitioner, and Master.
Pay If You Pass	PIYP	Offer presented only at DAMA-I or DAMA Chapter events, where people can take the exam and they only pay for it if they approved the 60% correct answers from a 100 questions.

1. Executive Summary

DAMA International® (DAMA-I) is a global, chaptered not-for-profit, vendor-independent organization that supports the professionalization, growth, and well-being of the data management industry. As such, it supports its global chapters through their affiliation in several ways, including the production and availability of resources such as (but not limited to) documentation to support chapter activities and success. This document is a chapter resource produced to assist chapters in planning and executing in-person chapter events, specifically their first **Chapter DAMA Day**.

Everything in this document is written sequentially. We intentionally designed the document to guide you step by step through the event planning and execution process. While it is beneficial to be familiar with the entire document, we encourage you to follow these steps in the order they are presented to achieve the best results.

***NOTE:** In this version, the content is written with a specific scope, enabling DAMA Chapters to successfully plan and execute a data management conference, or “DAMA Day”, in their city for their members and contacts. This guide is targeted to the event organization leader. We aim to describe everything that needs to be considered while keeping the document concise and easy to read, and to highlight recommendations.*

2. Scope and Planning

2.1 Time and Plan

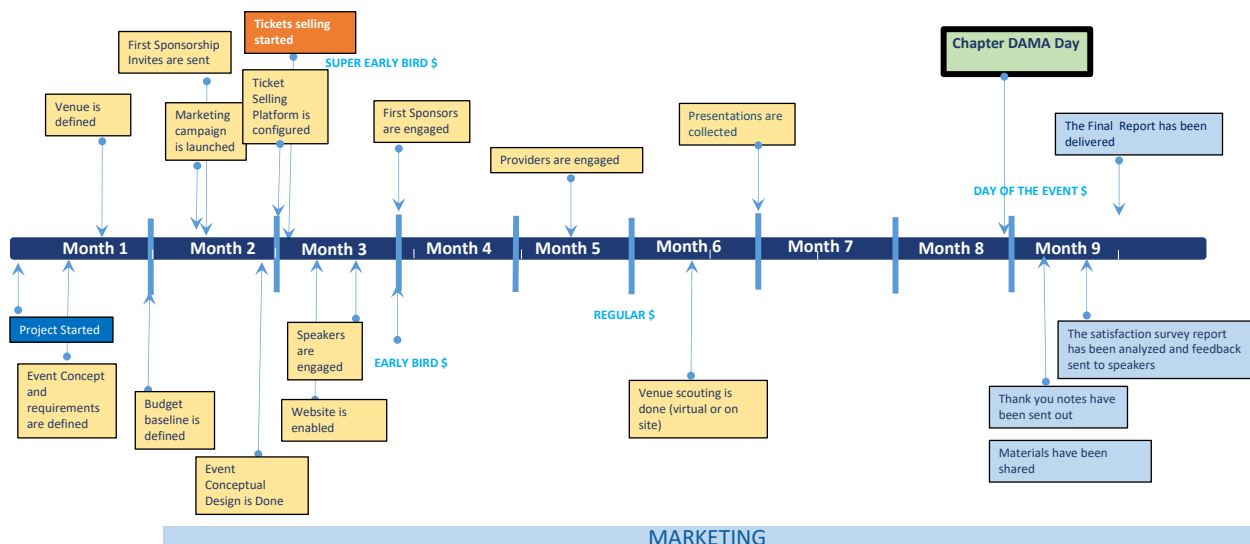
Choosing a date and time is what gets everything started, and it's important to decide quickly so plans can be secured. All interactions with sponsors, speakers, etc. will include a question about the date, and it's respectful to have it ready for their planning. Even before securing the venue or finalizing the program, the event can be announced and promoted to start raising awareness.

- ☛ Define the event date and create a timeline, setting the milestones that need to be accomplished.
- ☛ Define a detailed plan that outlines the tasks required to meet each milestone in your timeline.
- ☛ Assign a responsible person and participants for each task

The first step in planning the event is to set the event's date, after which the macro plan can be created. The plan should start at least **8 months** in advance. The proposed macro phases are as follows:

- **Pre-event:** Scope definition and Planning (Month 1)
- **Pre-event:** Design (Month 1)
- **Pre-event:** Development/Execution (Months 2-8)
- **During the Event** – Event eve and The Day of the Event
- **Post Event** (2 weeks)

A timeline could look like this:



2.2 Event's Concept

The first step is to define the Event's concept. Whether it is simply to raise awareness about what DAMA International® is and the existence of a DAMA Chapter, or if it's an event designed to provide value to an existing membership and to grow it.

DAMA International® allocates a specific budget each year to support selected Chapter events. Review the existing DAMA International® offer to help Chapters and the eligibility criteria to find out if your chapter can apply for support.

- ☛ Define the Goals of the event, including letting the audience learn about DAMA International®
- ☛ Define the Concept of the Event, establishing the following:
 - **Objectives** (e.g., to introduce the Chapter and its value proposition to potential community members or to grow membership)
 - **Goals** (e.g., To have 150 registered attendees, eight speakers, 30 CDMP exam takers, etc.)
 - **High-level structure** (e.g., full-day event with two conference tracks + CDMP® PIYP).
 - **Target audience**
 - Public sector
 - Private sector
 - Education
 - Etc.
 - **Guiding Theme** (e.g., Data Management as key for IA success)
 - **Potential venues**
 - **Potential sponsors**
 - **Potential volunteer staff**

It is useful to ask the following questions:

- What is the main objective of this event?
- Who is the target audience and why will they attend?
- What will be the event concept?

2.3 Roles & Responsibilities

It must be clearly established who is responsible for each part of the project at every stage. Even if a third-party event management team is involved, the Chapter's board members must take responsibility for the event. Volunteers will be needed during the event, so recruiting them early in the process will help secure their commitment.

Organizing an in-person event requires a significant number of activities and strict coordination among the roles and stakeholders involved. A common risk is relying solely on volunteer board members. Whenever it is possible, having the support of an event management team is recommended.

- ☛ Identify the roles required for the event organization and assign the Chapter Board member accountable/responsible for each role (if an event management is contracted, that would be the responsible person, but still an accountable person needs to come from the Chapter). A single person may be responsible for several roles; it is suggested that these roles have similar functions. Even if it is possible to have event management support from a third party, clear roles for the event project must be defined among the Chapter's board members to facilitate decision-making, issue escalation, and remediation.

Here is a list of possible roles:

- General Event Coordinator
- Finance & Budget Control
- Logistics & Operation
- Partnerships and Sponsorships
- Public Relations and Attention to speakers
- Marketing and Dissemination
- Technology & Technical Support
- Registration and Access Control
- Relationship with DAMA-I

2.4 Communication and Document Management

Effective communication is crucial throughout all phases of a project. You should utilize all available methods to stay in sync, adopt an agile approach for quick responses, and ensure that information is accessible to all stakeholders.

- ☛ Create media (e.g., WhatsApp, Teams) and shared file folders (e.g., Google Drive, Microsoft Teams, Dropbox).
- ☛ Establish a weekly schedule for checkpoint meetings, with a moderator, ground rules, and a predefined agenda:
 - Plan progress
 - Achievements
 - Issues
 - Next steps
 - Risks assessment
 - Mitigation action
- ☛ Establish ground rules (how to proceed when someone is absent, to prevent blocking the project's flow, escalation rules, etc.)

2.5 Marketing & Promotion

Spreading the word of the event and creating interest in attending or sponsoring it is crucial. It all starts with a strategy.

During this phase, identify the best channels for promoting the event. Considering the target audience, the most suitable social media platforms are LinkedIn and, secondarily, Facebook/Instagram.

A dedicated event website is essential as the central hub for conversions. You must define the website's layout, URL, and hosting plan.

- ☛ Include in the budget the costs for website development and hosting
- ☛ Allocate funds for marketing and community services if the chapter lacks staff to execute these activities

2.6 Budget

This isn't a detailed cost breakdown of the event at this time; it's about identifying items that should be included in the budget. With this, you can set your ticket prices and sponsorship fees and estimate the number of tickets and sponsors needed to break even and generate additional funds for future operations. What you need now is a high-level cost estimate, which will be refined later.

This is a list of possible items that should be considered to estimate the budget for a 170-participant event:

Concept	Baseline Allocated Budget USD\$
Logistics and venue*	\$0.00
Catering	\$2,900.00
Speakers travel expenses and fee (if applicable)	\$3,500.00
Assembly	\$1,500.00
Communication and promotion (marketing)	\$2,800.00
Website design and 6 month-hosting	\$1,900.00
Live translation service (if required)	\$1,500.00
Video recording	\$800.00
Technology and support (including ticketing and registration)	\$1,000.00
Event Management and administration	\$9,000.00
Welcome kits (Amenities and Promotions)	\$3,400.00
Speaker gifts	\$1,200.00
Printed materials (lanyards, badges, 3 roller-ups, 3 room signals, 1 large banner)	\$1,600.00
LinkedIn and Google Ads Budget	\$2,400.00
Ambulance	\$1,500.00
Total	\$35,000.00

* Having a university as Platinum sponsor will usually represent no cost for the venue; otherwise, this may be one of the most expensive items in your budget.

- ☛ Define the sponsorship model and the number of sponsors needed to cover the event's expenses.
- ☛ Define the ticket price model (Super Early Bird, Early Bird, Regular, and Day-of-Event). Think of this revenue as funds for the Chapter to operate the following year, but also as a backup option to meet the breakeven point in case not all the sponsors can be secured. Ideally, your income per ticket should be used for the Chapter's operation, and the sponsors should cover all the event's expenses.

2.7 Risk Assessment and Contingency Planning

Managing end-to-end risk is mandatory. Eight months may seem too long, and many activities can easily be overlooked or postponed. This is the main risk.

- ☛ Outline potential risks and be prepared with mitigation actions. Some samples:
 - Low Registration
 - Establish milestones with thresholds of tickets sold
 - Prepare promotions (e.g., 3x2)
 - Define when in the timeline you can start offering additional free tickets
 - Low sponsorship
 - Start promoting the event and the sponsorship model within the first month
 - Offer combined sponsorship (two sponsors going together)
 - Contact potential local sponsors through LinkedIn
 - Define when to reduce the price
 - Be prepared to offer sponsorship in kind when the prospect does not have a budget for sponsorship
 - Selling and registration platform failure
 - Define your contingency solution (e.g., wire transfer and manual registration)
 - Speaker cancelation
 - Have a board member be prepared to do a presentation
 - Etc.

2.8 Kick-off

Get started with a formal kick-off meeting with the team and stakeholders. This is where the project's charter must be presented, to ensure that all team members understand the purpose, concept, timeline, roles, and responsibilities, as well as how communication will be managed. Enthusiasm and energy start here. The challenge will be to keep it during the project.



1. For a first in-person event, a one-day, two-track event with the CDMP® PIYP exam will work well.
2. Allow enough time between conference slots for networking and visiting sponsors
3. Use the CDMP® PIYP as an anchor to attract attendees.
4. Consider getting sponsored data books to link a raffle to the event's satisfaction survey at the event's closure

3. Conceptual Design

3.1 Event Concept and Identity

Select a theme and develop your narrative. The theme also encompasses visual branding/color schemes, among other elements. This will create the event's identity. The concept includes defining if it will be a ½, 1-day, or 2-day event. Will there be only local speakers or also international ones?



Example of Event Identity. Once defined, everything about the event is presented using this identity (name, colors, shape). In this example, “Conexión DAMA: Costa Rica” (DAMA Conexión: Costa Rica) refers to an event designed to facilitate connections among professionals, senior leaders, thought leaders, organizations,

and sponsors. The colors represent the country's flag colors. This branding identity is used in the website, the presentations, the speakers and sponsors' invites, badges, lanyards, etc.

3.2 Audience Identification

Be decisive. Who are you trying to draw in? Think level, executives, working-level, students, practitioners? What industry? All of them? Healthcare, military? Some of this might be more precise, while others may be somewhat imprecise. But knowing your audience will change how you market your event and how you position your discussions.

- ☛ Identify who on your team has the most contacts and followers to influence, and assign them the responsibility of reposting the event's posting.
- ☛ Define the audience to be targeted in your LinkedIn and Google ads
- ☛ Identify influencers that may become media partners to promote the event

3.3 Agenda

At this stage, the program structure must be established based on the definition in 2.1. The sooner this is done, the sooner speakers can be engaged, and the earlier you can start promoting the event, even if you don't have speakers confirmed. The detailed agenda will evolve over the next few months based on the engagement of speakers and sponsors.

- ☛ Build a skeleton of the Event Program to determine the number of speakers needed to engage.
- ☛ Make sure to allow enough time for people to move from one session to the next one
- ☛ Make sure to allow enough time for networking and sponsor visiting
- ☛ If live translation is required, you may want to keep the speakers who will require translation in a single room, to keep translation costs down

3.4 Requirements Checklist

Identify the requirements for all the event items needed, based on the items listed in 2.6 (venue, AV, food, decorations, foreign speakers' accommodations, etc.). This list will serve as input for your readiness checklist prior to the event.

- ☛ Define the venue requirements (rooms and seats according to the event concept and target audience)
- ☛ Define your requirements for each local contractor (e.g., for catering, whether you require a coffee station, bottled water, snacks, lunch including vegetarian/vegan options, deserts, etc.)
- ☛ Identify the most convenient hotel for out-of-town attendees and speakers (consider location, distance from the venue, and room rate options for the event).
- ☛ Validate if the venue offers free parking for attendees, or contact parking options to explore if preferential rates can be offered for the event.
- ☛ Identify different means of transportation to get to the venue, so you can publish this

3.5 Staff volunteers

On the day of the event, there's always a need for extra help; several activities must be assigned to staff members, from welcoming and guiding guests to moving microphones for questions around an auditorium. Of course, the number of staff volunteers and their roles will depend on the size of your event, the venue facilities, and the expected number of attendees. Part of your crisis management plan involves relying on staff volunteers to whom you can assign specific tasks needed to handle the crisis. The earlier you can identify and secure these volunteers, the better. Keep in mind that, as volunteers, other last-minute priorities may prevent them from attending the day of the event, so consider this when building your team. Some of these staff volunteers can come from your chapter's board members if they are not acting as speakers or in other roles.

You can create your staff team through direct invites from the Chapter's board members or through a call for volunteers for the event as part of your Communication and Marketing strategy.

- ☛ Design an invite to staff volunteers, indicating details of the event, expected role, and time (online readiness meetings two months prior to the event, in-person at the venue, the Event Eve, and the Day of the Event).
- ☛ Send the invite to potential staff volunteers
- ☛ Design a message for the call for volunteers
- ☛ Define some form of identification for volunteers (t-shirts, wristbands, pins).

3.6 Venue(s)

The venue can be one of the most expensive items in your budget. This is why you may consider engaging a university as a venue sponsor, as this can help reduce your venue expenses, since they usually won't charge you. Typically, universities offer well-equipped auditoriums and rooms for parallel tracks and the CDMP® exam takers. You will also receive AV services at no additional charge.

- ☛ Get prepared with a presentation of your event, starting with an introduction to DAMA International® and the Chapter. Include the rationale for the benefits of the venue being part of this data management community building.
- ☛ Prepare a list of requirements (date, audience expected, space required, Internet access for attendees, and for CDMP® exam takers, with no restriction to access the D2L platform.
- ☛ Include the benefits for the venue (free tickets, speaker slot, prominent branding in marketing materials, etc.)
- ☛ Contact at least two universities, so you do not depend on a single bullet

3.7 Marketing and Promotions

A communication and marketing strategy must now be defined, having established the event concept, designed its identity, and identified the goals to achieve. The Communications and Marketing strategy must include at least the following items:

- Purpose
- Audience
- Media
- Type of messages during the project
 - Awareness (e.g., what is DAMA International®, the event concept, the opportunity of sitting the CDMP® in the PIYP modality, reasons for attending or sponsoring the event)
 - Information (e.g., venue, dates, program, speakers' bios, conference titles, sponsors, etc.)
 - Sales (e.g., Super Early Bird, Early Bird, Regular prices, promotions, etc.)

The goal of this phase is to create all the brand assets and the roadmap that will guide the subsequent execution.

- ☛ **Design the Marketing Strategy that will guide and prioritize the tasks to be executed**
 - Define goals, high-level key messages, and segmentation.
- ☛ **Design the Event Branding artifacts based on the event identity defined in 3.1**
 - Visual Identity design, Logo Creation, and Brand Guidelines
- ☛ **Design the Event Website**
 - Content Definition: Establish key sections.
 - Design and Wireframing: Create the layout or visual structure.
 - Define where the website will be hosted.
- ☛ **Define the Site or Tool for Ticket Registration and Payment**
 - Evaluate tools (e.g., TicketBox, Eventbrite, etc.) based on fees, ease of use, and reporting features.
- ☛ **Define how the website will integrate with the registration/payment tool.**
 - Generate a content calendar and sales phase.
 - Create a weekly/daily calendar defining the topic, key message, and channel for every piece of content, ensuring all relevant topics (agenda, venue, sponsors) are covered.
 - Establish key phases (e.g., Event Announcement, Early Bird Sale, Speaker Announcement, Final Sale), types of content, and channels.
- ☛ **Ensure that the Registration Platform and the Website Design are perfectly coordinated, as the website is the leading traffic driver to the point of sale.**
- ☛ **Designate the personnel responsible for executing the marketing plan. During the execution phase, this team must be available, technically capable, and brand-aligned to create and publish content. Crucially, ensure they have the correct, verified access to all communication channels.**

3.8 Budget

This is the point where you start detailing your budget. The initial versions will be based on your target number of attendees, expected participants, and anticipated funds from sponsorships and ticket sales. As the project advances and you evaluate the income received, you will need to revise those elements that are variable, depending on the actual number of attendees and participants.

- ☛ **Identify potential contractors and start conversations with them**
- ☛ **Get quotes for each item in your requirements list**
- ☛ **Ask for the latest time to provide final numbers for participant/attendees-dependent items**

3.9 Tickets and Registration

This is the time to define your pricing strategy. There are two critical risks: insufficient funds to cover expenses and failing to attract a sufficient audience to listen to the speakers. So, you want to

secure both things as soon as possible. Define the ticket pricing model, including the type and price of tickets.

- ☛ Consider the Super Early Bird, Early Bird, Regular, and Day-of-Event prices and deadlines for each phase.
- ☛ Define your discount and free passes code model
- ☛ Define the registration and payment platform you will use
- ☛ Define your registration and payment process for walk-in attendees on the day of the event (not previously registered)
- ☛ Include in your registration form if the attendee requires live translation (this will allow you to define how much to include in the final budget for this)
- ☛ Ask for any other requirements the attendee may have
- ☛ Include a question to explore interest in taking the CDMP® Exam. In this case, ask also if the exam would be Data Management Fundamentals or a specialty exam, offering the option to select one specialty. Also, ask if ESL (English as a Second Language) would be required

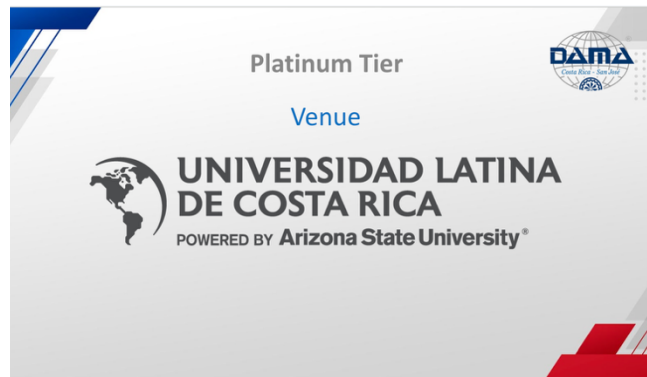
3.10 Sponsorship

The key factor to ensure the financial health of your event is to secure enough sponsors; therefore, the search for sponsors is one of the activities that must be initiated in the first weeks of the project. Begin searching for sponsorships at least eight months in advance to ensure sufficient time for research, negotiation, and internal approval processes with large companies.

Sponsor search is crucial. It's a strategic activity that involves more than just sending emails. A major risk is not securing enough sponsors to cover the event's costs; therefore, engaging sponsors early is vital. It's important to define your sponsorship model within the first few weeks of the project, so you can start sharing it with potential sponsors listed in Section 2.1 and others you need to identify. The model should outline the event's concept, the different sponsorship levels, and their prices and benefits.

- ☛ If you are producing the model in a local language different from English, also create an English version for potential global sponsors.
- ☛ Define a business case rationale for which a vendor/organization/company would be interested in sponsoring this type of event and this event (don't hesitate to use your preferred LLM tool to produce this).
- ☛ Clarify that the attendees' personal data will not be shared, so raffling something would be a good way for sponsors to collect attendees' contact data.

A sample of a sponsorship model:



Benefits offered:

- Table in the sponsors' area
- Logo in all printed and electronic communications
- Social media mentions
- Exclusive content in DAMA Costa Rica - San José social media as sole sponsor for that content
- Non-commercial 30-minute conference at the event
- Brand Awareness on event websites with links to sponsors' websites
- 30 event tickets for professors and students





Silver Tier

- ✓ Table at sponsors' area
- ✓ Logo in all printed and electronic communications
- ✓ Social media mentions in DAMA Costa Rica- San José accounts, with possible extension to DAMA International® and its partners' accounts
- ✓ International speaker conference PRESENTED BY sponsor
- ✓ Brand Awareness on event websites with links to sponsor's websites
- ✓ 10 event tickets for employees and clients
- ✓ 20% discount on additional tickets
- ✓ Availability: 3/3

USD \$1,500.00

Notes:

1) Due to the principle of Personal Data Protection, DAMA Costa Rica - San José will not be able to share the data provided by the attendees in their registration.

2) The sponsorship may be covered partially or totally by in-kind sponsorships; if partially, the pending amount will be covered in cash.



Bronze Tier

- ✓ Logo in all printed and electronic communications
- ✓ Social media mentions in DAMA Costa Rica- San José accounts, with possible extension to DAMA International® and its partners' accounts
- ✓ Brand Awareness on event websites with links to sponsor's websites
- ✓ 5 event tickets for employees and clients
- ✓ 10% discount on additional tickets
- ✓ Availability: 1/3

USD \$1,000.00

Notes:

1) Due to the principle of Personal Data Protection, DAMA Costa Rica - San José will not be able to share the data provided by the attendees in their registration.

2) The sponsorship may be covered partially or totally by in-kind sponsorships; if partially, the pending amount will be covered in cash.

3.11 Accessibility Considerations

Ensure inclusivity for attendees with disabilities (e.g., physical access, visual/audio accommodations) or language barriers (e.g., interpreters, multilingual material).

- ☛ List all the special requirements you will need to identify at registration time
- ☛ Explore which of these requirements could be offered by the venue prospects



1. Prefer a university as a venue, as it will reduce your expenses
2. Prefer contractors that are familiar with the venue
3. Run a PoC of the registration and ticket platform with all possible test cases
4. Identify the minimum required items in your requirements list to run the event
5. Define a threshold to start promoting more free tickets to the relevant target audience, keeping an eye on your minimum budget and your funds

4. Plan Execution

4.1 Readiness Checklists

Keeping checklists at different points of your event project is a good way to prevent overlooking something. During the first phases, the checklist will include the tasks in your plan to achieve each milestone. As you approach the event day, additional details will become available regarding the planned activities; please check them in advance to ensure everything is ready. Develop checklists to ensure these processes are followed and completed. Use the checklists in your weekly meetings to identify any additional risks and define mitigation actions.

4.2 Communication Plan

Effective communication is essential throughout the project and vital on the day of the event. In point 2.3 of this document, you have already established the communication media and created the shared file structure. As the project progresses, you will likely encounter additional stakeholders with whom you will need to maintain communication (e.g., speakers, contractors, venue representatives, sponsors).

- ☛ Collect contact information from stakeholders (organization team, DAMA Chapter members, speakers, sponsors' contacts, contractors, etc.), including email and mobile phone numbers.
- ☛ Create a reference list (directory) with stakeholders
- ☛ Establish clear escalation routes to solve issues
- ☛ Keep email for formal communication, invites, thank-you notes, etc.
- ☛ Establish a core instant messaging media group to communicate with the DAMA Chapter's stakeholders and the event management team
- ☛ As needed, create small instant messaging groups to discuss and progress in specific topics (e.g., venue, catering, emergency services, volunteers, etc.)
- ☛ Share monthly progress reports with stakeholders

4.3 Data Collection and Privacy

You will collect personal data not only from attendees but also from all stakeholders, speakers, sponsors, contractors, and volunteers. Managing this data securely is essential (e.g., registration details, photo consent, GDPR considerations).

- ☛ Limit the data required when interested parties register to attend the event; include your privacy notice, and capture consent to use the contact information for the event's purpose, as well as consent to appear in the event's photos and video recording.
- ☛ When collecting the speakers' presentations, also obtain their consent for the use of their image and voice in connection with the event, as well as their consent to share the material presented with attendees.

4.4 Tools

Consider the tech tools required. (e.g., YouTube, online conferencing platforms, Zoom, Teams) and ensure that you define all the necessary configurations and run all the required test cases.

- ☛ List all the tools you will require and make sure proper access is established for whoever will oversee configuring each tool. The most common required tools include:
 - Social and Professional Networks
 - Web site
 - Ticket selling and payment platform (e.g., Eventbrite, Wild Apricot, DAMA-I Member Suite, etc.)
 - Online streaming tool if your event's concept includes a hybrid mode
 - Online conferencing platform for checkpoint meetings
 - File sharing environment
 - Instant messaging platform
 - Registration tool to record attendance on the day of the event
 - Survey tool
- ☛ Define all the proof of concept (PoC) exercises that you will need to run to make sure the selected tool will cover your needs
- ☛ Define and test cases for the ticket-selling and payment tool, considering at least the following scenarios:
 - A person paying for a ticket
 - A person paying for a group of attendees
 - A person entering a discount or a courtesy coupon
 - A person entering a courtesy coupon for a group of attendees

4.5 Venue Arrangements

Once you've secured your venue, connect with a single point of contact and review all the details to ensure the space meets your needs. Start by sharing your requirements and confirming that they can be met. Visiting the site in person is essential to finalize the layout and ensure everything functions correctly.

- ☛ Confirm size and services in each room (projector, screen(s), air conditioner, backstage in auditoriums, etc.)
- ☛ Confirm layout for registration, sponsors' exhibition, coffee break, lunch
- ☛ Make sure there's a room with enough space to sit your CDMP® exam takers. Ask for tables with space for attendees to have their laptop, plus a book/notes/tablet
- ☛ Ask for WIFI information in advance so signs with the information can be printed
- ☛ Ask about contractors that usually work at the venue (catering, ambulance, translators, video recording, etc.), as it would be, if possible, to go with contractors familiar with the venue
- ☛ Consider a scouting visit
- ☛ Verify if the venue covers special permits and insurance

- ☛ Check on parking facilities
- ☛ Arrange access to set up everything the day before the event
- ☛ Run AV testing in the venue rooms the day before the event to make sure everything is working well

4.6 Marketing and Promotions

This phase begins after the branding is complete, website is designed, and budget is finalized. Here are the key activities to execute in this phase, broken down by function:

- ☛ **Starting month 3, initiate Activation and Development**
 - **Content Asset Creation:** Based on the defined branding, create all necessary visual assets (artwork) for social media content and the event website.
 - **Website Development and Testing:** Develop the website and integrate it with the registration tool. Once complete, conduct thorough testing of the registration and ticket purchasing process.
 - **Website Quality Assurance (QA):** Verify that the website functions correctly, all sections are complete, and the visual execution adheres to the established branding guidelines.
 - **Content Publishing:** Implement the content calendar by creating and publishing daily/weekly content.
 - **Campaign Launch:** Launch all pre-designed advertising campaigns across your primary channels.
 - **Performance Evaluation:** Establish periodic checkpoints to evaluate the effectiveness of marketing and advertising campaigns and, if necessary, adjust required to improve performance.
 - **Media Outreach:** If applicable, distribute press releases or pitch stories to relevant media outlets based on key event milestones.
 - **External Dissemination:** To increase the event's dissemination, request support from professional colleges or associations in promoting the event among their members.
 - **Urgency Campaigns:** At least one month before the event date, create an Urgency Campaign:
 - Design messages that generate urgency to drive immediate purchases from potential attendees who have not yet decided (or who are still undecided).

The success of the Execution Phase is measured by **data** (sales, clicks, conversions) and **diligence** (staying on schedule and managing the budget dynamically).

4.7 Registration

Registration process. Sale of tickets. Info packages. Tickets for the event on the day of. Badges. Etc.

- ☛ Include in your registration form if the attendee requires live translation (this will allow you to define how much to include in the final budget for this)
- ☛ Ask for any other requirements the attendee may have
- ☛ Include a question to explore interest in taking the CDMP® Exam. In this case, ask also if the exam would be Data Management Fundamentals or a specialty exam, offering the option to select one specialty. Also, ask if ESL (English as a Second Language) would be required.

4.8 Budget Detail

Refine the budget outlined in 2.7 by including details to determine how many tickets need to be sold and how many sponsors are required. As the project progresses, you'll need to assess the funds collected from sponsors and ticket sales. You might have to revise the budget to remove non-essential items or limit the number of attendees for certain items, such as badges, coffee/water, snacks, and lunch, based on the quantity needed. It is essential to monitor costs against the budget and the funds raised throughout the planning and execution stages.

If there's a risk of failing to meet the Break-Even Point, you will need to eliminate non-essential items from your budget, such as welcome gifts and recording.

- ☛ Clearly identify which costs are essential and which are non-essential in your budget. Essential expenses are the minimum necessary costs to hold the event successfully. The budget based on these essential expenses sets the minimum fundraising goal you need to reach through sponsorships and ticket sales (the break-even point).

Experience in event planning shows that the most significant expenses usually fall into these main categories:

- Venue Rental and Basic Logistics
 - Venue Rental: This is often the single highest fixed cost in the entire budget (this is why getting a University or other Platinum sponsor providing the venue is the anchor of the event project).
 - Essential Venue Services: This includes basic security, cleaning, and necessary liability insurance, which are typically part of the rental fee.
- Food and Beverage (F&B / Catering)

- Full Catering: If the event includes lunch, dinner, or an elaborate cocktail (a non-essential expense that adds significant value), the cost per person for food and beverages rises sharply. This is a variable cost that increases directly in proportion to the number of attendees.
- Fees and Travel/Lodging for Key Speakers: Their fees, if applicable, along with their travel (air, ground) and accommodations, are among the highest individual expenses.
- Digital Paid Advertising (Ads): Although considered non-essential, allocating a substantial budget for paid advertising (Google Ads, Meta, TikTok, or even LinkedIn) to increase ticket sales or sponsorships is necessary. It helps expand outreach and can be one of the most significant promotional investments.

Refer to Appendix B for the criteria to determine essential items.

4.9 Sponsors

The key factor to ensure the financial health of your event is to secure enough sponsors; therefore, the search for sponsors is one of the activities that must be initiated in the first weeks of the project. Start searching for sponsorships at least eight months in advance to ensure sufficient time for research, negotiation, and internal approval processes with large companies.

- ☛ Start with an inventory of potential sponsors with whom you have contact
- ☛ Use the presentation with the sponsorship model defined in 3.9
- ☛ Establish a clear process for Lead Generation and Sales (e.g., send an email with the sponsorship model deck, schedule a call, follow up calls, reminders, closing engagement)
- ☛ Be open to flexibility to adapt to sponsors' requests when you see true interest
- ☛ Do not concentrate only on big corporations that may have more complex internal processes

4.10 Permits and Insurance (*if required*)

Permits or insurance for the event are usually already covered by the venue, but there may be specific items you will need to cover, like having an ambulance at the venue during the event.

- ☛ Confirm the Emergency Service that best meets the requirements and the budget.
- ☛ One month before the event, if applicable, confirm with the venue that all permits and insurance coverage are approved and paid. Obtain a copy of Certificates of Insurance and permits.

4.11 Contractors

In this execution phase, you must decide with which contractors you will work and establish contact with them, as well as the details to deliver the products or services.

☛ **Start the stage Pre-Contracting and Adjustment 2 Months Before the Event Date**

- **Establish Minimum Options:** By this stage, you should have identified **at least two potential vendors** for each essential area. You should also be aware of the deadline for placing the order and making the payment.
- **Evaluation and Budget Adjustment:** Using the information from the quotes and the funds raised, evaluate the best options and adjust the budget to cover expenses in line with the secured funds.
- **Quote Confirmation and Adjustments:** Request that the selected vendors confirm whether their quote remains valid. If necessary, inform them of any required adjustments (e.g., a smaller number of people for the food and beverage service).

☛ **Start the stage Contract Finalization and Logistics 1 Month Before the Event Date**

- **Process Initial Payments/Deposits:** Ensure that initial payments or deposits have been processed (if not paid earlier) and prepare the final payments according to the contract terms to avoid delays or conflicts on the event day.
- **Make Final Payments:** According to the deadline set by each vendor, make the corresponding payments (if required in this phase).
- **Conduct Final Site Visit (Walkthrough):** Conduct a final site visit with key contractors (e.g., catering) to review the layout, entry/exit points, and load-in/load-out times.
- **Communicate Detailed Call Times:** Establish and clearly communicate the exact times each contractor must be present for setup, when they must complete breakdown, and when they must deliver the purchased items (printed materials, badges, souvenirs, etc.).

4.12 Transportation and Parking

After choosing the venue, find out about transportation and parking options. Contact the venue to see if there are any arrangements or discounts available.

- ☛ **Contact the parking options to arrange a discount for attendees if there's no facility offered by the venue**
- ☛ **Publish transportation and parking options on your event website**

4.13 Staff Volunteers

Having a smooth and successful event relies on many factors, one of the most important being the clear assignment of roles and responsibilities for the various tasks that need to be handled. If you can afford to hire an event management service, that will be very helpful, but the Chapter's board

members will still need to have roles assigned, such as being the presenter of the speakers in each room, acting as proctors for the CDMP® exam, and being prepared to step up with a presentation if a speaker doesn't show up. Several other roles will require volunteers to assist with different tasks, as mentioned in 3.5. At this stage, you should secure your volunteers, including some who may not have a specific task assigned beforehand, but will help with whatever is needed, especially if a crisis arises.

- ☛ Send invites as Event Volunteers to personal contacts that the Chapter board members may have
- ☛ Post a call for Event Volunteers
- ☛ Collect contact information
- ☛ Maintain the Event Volunteers informed on the evolution of the project and on the phase in which they will be required to participate (a month before the event)

4.14 Accommodation

Arranging lodging with negotiated room rates for the event is necessary if you expect out-of-town speakers, sponsors, and attendees. In this phase, you must evaluate two or three options. Try to prioritize convenience near the venue, but other factors, such as restaurants and attractions, may also be considered. Once you select an option, negotiate a room rate for the event. If your Chapter is paying for speakers' lodging, you want to get the best cost-to-benefit ratio from it.

- ☛ Negotiate the room rate and confirm if it includes breakfast
- ☛ Announce the selected hotel and negotiated room rates on your event web page
- ☛ Keep communications with a hotel representative
- ☛ Confirm the reservation for your guest speakers (you would likely need to pay in advance)



1. Run a PoC of the registration and ticket platform with all possible test cases
2. Identify the minimum required items in your requirements list to run the event
3. Define a threshold to start promoting more free tickets to the relevant target audience, keeping an eye on your minimum budget and your funds

5. Program Development

5.1 Agenda and Scheduling

At this point, you will need to refine the agenda as you engage speakers and secure sponsors who receive speaking benefits.

- ☛ Make sure speakers agree on the timeslot assigned to them
- ☛ Keep your website program updated as the program evolves and the agenda gets refined

5.1.1 Speaker Management

From the moment you engage with speakers and obtain their acceptance to participate, you must maintain ongoing contact with them to keep them well-informed about the event schedule, the submission deadline, and the logistics on the day of the event.

- ☛ Start the engagement by sending a formal invite that specifies the event date and time, and ask for their photo, bio, conference title, abstract, and mobile number.
- ☛ Share a presentation template with the event identity as an option to be used
- ☛ Make sure speakers agree on the timeslot assigned to them
- ☛ Make it clear to speakers when the deadline to submit their presentation is (at least one month before the event)
- ☛ Ask speakers if they need any exceptional AV support (e.g., if their presentation includes video)
- ☛ Make it clear that they need to submit their presentation both in PowerPoint (to be displayed) and in PDF (to be shared).
- ☛ Let speakers know that the presentations will be installed on a laptop in the room to facilitate switching presentations; ask if there are any special requests
- ☛ Let the speakers know any instructions for the day of the event

5.1.2 CDMP® PIYP

A meaningful way to attract attendance from both active Chapter members and potential members is to offer the opportunity to sit for the CDMP® Exam in the 'Pay If You Pass' modality.

- ☛ As soon as you start your project, register your CDMP® PIYP event following the CDMP® PIYP Quick Guide provided by DAMA International® (pending to ask Jennifer for a link to it)
- ☛ Send the CDMP® Instruction letter you received from the CDMP® support team to all registered individuals who indicated an interest in taking the exam.
- ☛ Ensure that your proctors have proper access to the event in D2L (following the CDMP® PIYP Quick Guide) so they can track who has enrolled in the exam.
- ☛ Be prepared with a list of registered CDMP® candidates to verify their photo ID and record their score before they leave the room.
- ☛ Be prepared to receive last-minute people interested in taking the exam, if you still have room for them

5.2 Stakeholder Outreach

Continuous and effective communication must be established with diverse stakeholders, including speakers, sponsors, the event coordination team, contractors, and staff volunteers.

- ☛ Keep your stakeholders' contact directory updated

- ☛ Define who would be the single point of outreach
- ☛ Keep stakeholders updated during the project as required, and provide detailed information during the week before the event

5.3 Content Creation/Collection

You will produce and gather marketing content, including templates, presentations, badges, lanyards, banners, roll-up displays, and other materials. It is important to assign specific sections in your file-sharing structure for organizing all this content.

- ☛ Use the event identity in all your content templates
- ☛ Design a template for presentations based on the event identity, but make it optional for the speakers to use it
- ☛ Give special attention to tracking the timely submission of presentations. Be prepared, though, for speakers coming with last-minute updates.

5.4 Entertainment and Activities

Outline the activities you'd like the audience to participate in. If you plan to take a photo with all attendees, speakers, and Chapter members, schedule it during the event so you don't miss anyone. Ensure this activity is announced in advance.

An important activity to be carried out, which is normally challenging, is collecting attendees' feedback on the event. This must happen when the attendees are still in the event. A good way to get this feedback is by linking it to a raffle at the end of the event.

- ☛ Design your digital survey for attendees' satisfaction
- ☛ Encourage sponsors to provide items for raffling. This is a good way for sponsors to collect attendees' contact information.
- ☛ Try to get a publisher as a sponsor (e.g., Technics Publications) to donate books for raffling
- ☛ Include the announcement of the activities to engage attendees at different times of the event to encourage people to participate



- 1. Announce the limit of CDMP® exam seats to encourage people to register early**
- 2. Make sure you have an effective communication channel with volunteers and speakers**
- 3. If some speakers require translation, assign their sessions to a single room (such as an auditorium) to have only live translators present in that room.**

6. Day-of-Event Execution

6.1 Readiness Checklist

Coordination among all involved parties must clearly established before the event day. A readiness checklist should be created one month in advance of the event to ensure all details are covered.

As the Day of the Event approaches, a review of the pending items becomes crucial. Starting a month before the event, the readiness checklist must be reviewed every other day and daily during the last week.

- ☛ Assign a responsible person for each task in the readiness checklist.
- ☛ At each checkpoint meeting, evaluate the risk of not finishing on time and define the required mitigation actions.

6.1.1 Volunteer/Staff Coordination

Confirm the participation of volunteer staff at least two months before the event. Starting one month before, include them in your weekly readiness checkpoint meetings to ensure their roles and activities are clear, as well as the times they need to be at the venue on the eve of the event and on the Day of the Event.

- ☛ Choose how you will communicate (LinkedIn, WhatsApp, Group chats, email, Teams channel, etc.).
- ☛ At each checkpoint meeting, evaluate the risk of not finishing on time and define the required mitigation actions.
- ☛ Create an instant messaging group to communicate with the volunteer staff
- ☛ Make sure to have designated photographers with a checklist of “moments to be captured”

6.1.2 Crisis Management

No matter how well you plan and prepare with your readiness checklists, there will generally be at least one crisis event. Of course, you can't anticipate what it would look like. Picture this: you spent all the day before the event making sure the set up was ready, placing the registration table, roll ups, signs and any other decorations, doing all the AV testing, loading the presentations in the machines to be used in each room, and making sure your contractors know what time they need to show up, and where to get set up. You go to sleep confident that everything is ready. The Day of the Event is finally here! You start your day with energy and excitement; you arrive at the venue and begin with a briefing from your organization team and volunteer staff, and the news start: there are no volunteers for staff, the person who was in charge of bringing the laptops that were loaded with the presentations and tested with the projectors, brought other laptops instead; the contractor who would bring food and beverages is stuck in the traffic; the only one speaker that didn't submit the presentation has not shown up. While you are trying to figure out how to proceed in each case (everyone is talking to you at the same time), you notice that the line of people waiting to register and get their badges is growing — growing. Be prepared to stay cool, avoiding overwhelm and stress by determining which crisis has priority in your program (coffee and snacks could wait, the laptop with the presentation can't wait)

- ☛ Make sure to have a WhatsApp or similar group with the organization team and staff
- ☛ Make sure you have a way to contact someone to support if an issue related to the venue arises (e.g., a room with the air conditioner not working)

- ☛ Designate backup prepared laptops assigned to different people
- ☛ If you are in charge of the event, you should not have a specific role (e.g., at the registration desk), as you need to keep a close eye on everything and make decisions when a crisis arises.
- ☛ Be prepared to ask for and accept help from emerging volunteers.
- ☛ Keep stakeholders communicated

6.2 Event Eve

6.2.1 Setup

Arrangements must be coordinated with the venue and contracts to ensure everything is set up the day before the event. This includes arranging the tables and exhibition area, classifying badges, hanging signs, setting up roll-ups and banners, and, if needed, assembling the translation booth—all of which should be completed the night before the event.

6.2.2 Technical Set Up

The day before the event, test that the audio and video work properly. The laptops to be used in each room must be tested for connectivity and screen sharing. Auditoriums usually have video and audio controlled from a control cabinet. Sometimes, you can have the laptop with the presentations at the stage, and the AV person controls the transition images projected while switching speakers.

For alternate rooms (for parallel tracks), what you want to validate is screen sharing from the laptop to be used.

- ☛ Test audio and video in each room with the primary and backup laptops
- ☛ Make sure you have a slide clicker for each room
- ☛ Ensure there are enough energy outlets for the registration table, the sponsors' exhibition, and most importantly, for each of the CDMP® exam takers
- ☛ Confirm the WIFI information to be shared with the attendees (usually the WIFI in the exam room is different with wider bandwidth)

6.3 Guest Experience

The big day is finally here. Everything that has been planned, designed, and executed aims to build community and create a memorable experience, not just for the attendees, but also for the speakers and sponsors. There are several things you need to anticipate and plan for to ensure your guests have a great experience.

- ☛ Make sure the venue security gates have information about the event and the people attending
- ☛ Do a rehearsal for checking in, to make sure your system is effective, and the time per guest is acceptable, to deal with most of the attendees showing up at the same time
- ☛ Set the badges in alphabetical order without the lanyard attached

- ☛ Define and test how to register walk-in attendees who want to pay on site
- ☛ Have the Chapter's President and/or board members welcome attendees
- ☛ Identify at the registration table the attendance of the CDMP® candidates pre-registered
- ☛ Make sure there's enough space for people to circulate in the sponsors' exhibition
- ☛ Ensure enough space for people to sit for lunch (if included)
- ☛ Encourage attendees to interact with sponsors and speakers
- ☛ Invite the new CDMP® holders to the stage to recognize their achievement



- 1. Have alphabetically ordered printed lists of registered people to facilitate parallel check-in**
- 2. Start the day with a briefing meeting with staff and volunteers**
- 3. Ensure there's a clear communication and escalation mechanism to address any incident**
- 4. BE SURE TO CELEBRATE THE SUCCESS AFTER THE EVENT!**

7. Post-Event Activities

The event is over. It was a big success, but the work is not finished. The next two weeks must be dedicated to activities needed to wrap up and close the project. There will always be valuable lessons learned from what worked well and what didn't.

7.1 Teardown and Cleanup

Still filled with the excitement of a successful event and mission accomplished, all the setup must be torn down and everything cleaned up before heading to celebrate.

- ☛ Make sure to take those last-minute photos to capture all the excitement before tearing down the setup!
- ☛ If you want to recycle lanyards and badge holders, set a bin for attendees to drop them in
- ☛ You must have designated who will take home the leftovers and the roll-ups and banners, some of which could be reused in other events
- ☛ Have your volunteer staff check all the rooms used to ensure nothing was left there

7.2 Follow-up

Several messages need to be sent: thank-you notes to speakers and sponsors, inviting them to stay in touch with the Chapter and opening the door for further participation; thank-you notes to attendees, including a link to shared materials; and thank-you notes to volunteer staff.

7.3 Reflection

Even if your event was successful, there's always room for improvement in next year's event. Review the survey results, track/log lessons learned, and document for the next event. Include reviewing the financial balance.

- ☛ Schedule a closure meeting with the stakeholders to share the results and lessons learned
- ☛ Make sure the documented findings become part of the baseline for the next event

7.4 Reporting and Documentation

A good way to close the project is to produce a final event report to share with the Chapter board, sponsors, and DAMA-I. This report should address the outcome in terms of attendance, finance, CDMP® exams approved, and survey results.

8. Frequently Asked Questions

I. Strategy and Objectives (The "Why" and "For Whom")

- What is the main objective of this event?
Awareness, Education, and Growth. The primary goals are: promote DAMA-I/the chapter, share data management knowledge, and attract new members.
- Who is the target audience and why will they attend?
Our audience consists of professionals and students interested in Data Management. They attend for education, networking, and career advancement.
- What will be the event concept?
The concept must align with the primary objective.
- What is the ideal lead time for starting planning and ticket sales?
Start planning at least six months in advance. A period of 8 to 9 months is strongly recommended for major contracts and sponsor sales.

II. Finance and Budget

- How should ticket prices be calculated to ensure we meet our revenue goals?
Base pricing on financial break-even. Also, consider the economic capacity of the target audience. Ensure sales volume guarantees the event's economic sustainability..
- How many sponsorships are required to reach our financial break-even point?
Aim for 6 to 9 total sponsors. This number ensures high sponsor visibility and prevents attendees from being overwhelmed.
- What are the recommended sponsorship tiers, pricing, and associated benefits for partners?
The recommended tiers are Platinum, Gold, Silver, and Bronze. Pricing is set by market value and ROI, not just cost. Platinum is often reserved for the Venue partner or a major exclusive sponsor.
- What are the 3 most expensive line items and where can I look for cuts without compromising the correct execution of the event?
The usual highest costs are typically Venue Rental, Catering, Key Speaker Fees, and Travel/Lodging.
- What percentage of the total budget should I allocate for contingencies and emergencies?
Allocate a minimum of 10% of the total budget for contingencies.
- When is the critical deadline for securing funds to finalize the budget and begin contractor payments?
One month before the event is the critical deadline. All funds must be secured by this date.

III. Logistics and Operational Risks

- How do we handle logistics if the number of attendees exceeds or falls short of expectations?

3 weeks out: If exceeding, confirm venue capacity and budget for extra F&B, or announce Sold Out. If under, increase complimentary passes and cut variable F&B costs.

- What is our contingency plan (Plan B) if a speaker cancels or audiovisual equipment fails?

At least a couple of Chapter Board members must have a presentation ready to fill the slot when a speaker does not show up.

There must be backup equipment for each room with the presentations loaded.

- Which legal permits or insurances are the responsibility of the organizer vs. the venue?

This depends on the Venue contract and local laws. Clearly define insurance, permits, and liability in the signed contract.

- What is the most efficient way to manage check-in and accreditation for hundreds of people?

Use two or more dedicated check-in tables. Have personalized badges ready. Start the check-in process at least one hour before the event begins.

- What type of Food & Beverage (F&B) service is appropriate for the one-day duration of the event, and what dietary options must we consider?

It will depend on the budget available. Appropriate service includes morning coffee/water, a light snack, mid-day lunch, and an end-of-day cocktail/networking reception. Always plan for common dietary restrictions.

IV. Marketing and Promotion

Focuses on maximizing visibility and sales:

- How do we ensure our paid ads generate a sale and not just clicks?

This will strongly depend on the marketing strategy, the audience segregation and the messages delivered.

- When is the optimal time to launch the Early Bird sale, and when should it end?

Launch the Super Early Bird sale immediately when the website and integrated registration tool are live. Let it run for one month before moving to the Early Bird sale, to be running for two months before moving to the regular prices.

- What information is essential to include in the toolkit for our sponsors?

Create a professional Sponsor Toolkit (PPT/PDF). It must include event details, audience profile, opportunity value, and clear benefit outlines

- Should we hire an agency for marketing execution and community management, or manage these activities internally?

Manage it internally only if chapter personnel have the required skills, experience, and time for the entire 8-month execution period. Otherwise, hire an agency.

V. Measurement and Post-Event

- What are the key metrics we must measure during and after the event to evaluate success?
 - a. # Attendees (breaking it down by sector, organization level, gender)
 - b. # Participants
 - c. Paid attendees/total # of attendees
 - d. Revenue
 - e. Satisfaction on:

- i. Event in general
 - ii. Speakers
 - iii. Organization
 - iv. Venue
 - v. Most significant conference topic
 - vi. Less significant conference topic
 - vii. Interest on future topics
- When is the best time to send the post-event satisfaction survey, and what type of questions should we ask?

Request survey completion after the final speaker session and before the closing ceremony. The best way to ensure responses is by linking it to a raffle that will be held before the closure.

9. Conclusion

A Chapter DAMA Day is the flagship event of the Chapter. Organizing and running an in-person event is no trivial matter. It takes planning, design, lots of time, and effort, but it's well worth it. This is what creates strong bonds with the existing data management community and encourages people new to DAMA® to become part of this great family. We expect this guide to be received as a valuable resource for your Chapter development and growth.

Appendix A – Samples and Templates

Section	Description	Link
Timeline	High level timeline	https://damaint.sharepoint.com/:p:/g/CS/Eegr9WTnT0lOk-8mDaOWPO0B-R2SQQVLfNXiHKIEDZrbEg
Preliminary Planning	Detailed level planning sample	https://damaint.sharepoint.com/:x:/g/CS/EdSanlyPvkJClzCFCg0fabQBeUAsSsx5AW8yBk5v9qi-Gg
Conceptual Planning	Template to set the event concept	https://damaint.sharepoint.com/:w:/g/CS/EUfR4dZ1RydNni1RA1bkrxUBmfMUGXxgkmp9ctxCxBECGw
Logistics	Last mile readiness checklist sample	https://damaint.sharepoint.com/:x:/g/CS/EfH2tpCtcgRJo-68hrU-3kkBuFkMXw7mtbgnL61E3UraEg
Program Development	Event presentation for sponsors sample	https://damaint.sharepoint.com/:b:/g/CS/EewPlIm1RFxGgCkg6BE3zHUBPfmZR50-C8N855QmKN5WCg
Marketing and Promotion	Samples images for marketing	MARKETING IMAGES SAMPLES PRINTING MATERIALS SAMPLES
Day-of-event Execution	Readiness checklist sample	Chapter DAMA Day Readiness checklist sample.xlsx
Post-event Activities	Sample of final event report	2025 DAMA Costa Rica-San Jose DAMA Chapter Day- Progress October 6 2025.pdf

Appendix B – Criteria for minimum required items

General Category	Specific Item	Minimum Justification (Essential)
1. Venue and Logistics	Venue Rental Fee	Fixed cost. Without this, there is no event.
	Utilities and Basic Cleaning	Minimum required by the venue contract (electricity, water, basic cleanup).
2. Food and Beverage (F&B)	Civil Liability Insurance	Legal or contractual requirement of the venue.
	Basic Permits and Licenses	Municipal or government permits to operate.
	Coffee Service and Snacks (Break)	Enhances the experience and networking.
	Lunch or Dinner (Catering)	Increases the perceived value of the ticket.
3. Technical Production	Audio and Microphone Rental	Necessary for speakers to be heard.
	Projector and Screen	Minimum required for visual presentations.
	Internet / Wi-Fi Connection	Required for staff operations and speakers.
4. Human Resources and Staff	Minimum Security Personnel	Required by the venue or by law.
	Registration / Logistics Staff	Minimum required for check-in and key event <i>runners</i> .
	Fees for a Key Producer/Coordinator	A single role for essential supervision (if applicable).
5. Content and Speakers	Transportation and Lodging (Critical)	Only for indispensable speakers whose contract requires it.
6. Sales Operations	Ticketing Platform Commissions	Fee per ticket sold
	Payment Processing Costs	Bank or payment gateway commissions.

General Category	Specific Item	Minimum Justification (Essential)
1. Marketing and Outreach	Digital Advertising Budget (Ads)	Amplification of reach (Google, Meta, TikTok) - Crucial for sales.
	Professional Graphic Design	Improves the event image and promotional materials.
	Email Marketing / CRM Tools	Platform costs for lead management and outreach.
2. Attendee Experience	Swag / Welcome Gifts	Merchandising, added value for sponsors.
	Additional Furniture (Lounge)	Comfortable spaces for networking.
	Additional Staff (Hosts, Guides)	Improves customer service and flow.
3. Production Upgrades	Video Recording and Editing (Post-Event)	Creation of content for future promotion.

Appendix C – Timeline Checklist

Phase	Period	Milestone/ Key Activity
PHASE 1: DEFINITION & PLANNING	Month 1	Define the event concept and participant profile
		Venue scouting and selection
		Generate Initial Base Budget and Project Macro Plan
		Define team roles, responsibilities, and communication mechanisms
		Define promotion channels (Marketing)
PHASE 2: CONCEPTUAL DESIGN	Month 2	Create event identity and Branding
		Event agenda structure and Sponsorship Model
		Design of Marketing Strategy and WebSite
		Define the Ticket Registration and Payment tool
		List of Execution Requirements (catering, AV, translation, printed material)
		Generate Detailed Budget and Pricing Strategy
PHASE 3: DEVELOPMENT & EXECUTION	Months 3-7	Execute Marketing strategy (campaigns) and Content Calendar
		Identify and liaise with local suppliers
		Website Development and integration with Registration tool
		Final Agenda with confirmed speakers and slot times
		Travel and lodging logistics for international speakers
		Assets for printed material

Phase	Period	Milestone/ Key Activity
		Confirmed Sponsors and their payment
		Final Budget adjusted and confirmed number of attendees
PHASE 4: EVENT READINESS	2 Weeks before Event Day	Final confirmation of orders placed with all vendors
		Venue activity Checklist (logistics, security, access)
		Collection of Speaker Presentations in central repository
		Generate Minute by Minute plan for the event day
		Design satisfaction survey
		Final list of attendees, staff, and sponsors
PHASE 5: EXECUTION & CLOSEOUT	The Day-1 of the Event	Technical validation of audio and video in venue facilities
		Reception of printed materials
		Logistics meeting with chapter members, venue staff, event staff and event coordinator
	The Day of the Event	Reception and catering setup. Install check-in table
	Post Event (2 Weeks)	Prepare final event report
		Prepare Final Financial Statement
		Analyze survey results
		Event Web Site Shutdown