

**STAGEDGE**

# FROM DISCOVERY TO DEBRIEF

Walking Through  
Stagedge's Client Journey



# Event day is coming. Do you have the right partner?

You have an earmarked budget, executive buy-in, and maybe even a venue. Suddenly, your to-do list is a mile long, you're worried about everything from the keynote speaker to attendee registration—and you haven't even started promoting your event.

**Bottom line: you need help.**

That's where Stagedge comes in. As a full-service production company, we create seamless, sophisticated event experiences that engage audiences and delight our clients. From the moment you decide to partner with us, we become an extension of your team as we walk through the planning process. Through our proven process, we learn about your audience and event objectives and—leveraging our 45 years of experience—bring your event to life.

But what does our process look like? In this e-book, we'll walk you through our client journey and describe everything you need to know before we have our first conversation.





# 1

## DISCOVERY: DETERMINING “THE RIGHT FIT”

Whether you've worked with us before or we're meeting you for the first time, the first step remains the same: We want to learn more about you and your event.

First, we'll set up a discovery call for you with one of the professionals on the Stagedge team. This isn't a sales pitch or a presentation, but a conversation. As your prospective event partner, our goal is to understand your vision as well as what you'd like to accomplish. Are you planning one event or seeking to develop a long-term event strategy? What changes or reactions do you hope your audience will experience after attending?

While the basic specs of an event—size, budget, and location—are important, our discovery process is designed to take your event beyond these quantitative specifics. Our “big picture” questions allow us to start outlining your event's key elements and timeline. If we know enough about the kind of technology or streaming support you may require, we'll bring in other team members to discuss your current tech stack.



The discovery call isn't just an opportunity for us to get to know you; it's also a chance for you to get to know us. We want to ensure your event is a "good fit" for our services, and we encourage prospective clients to ask us tough questions about our capabilities. From the outset, we want our clients to feel confident that Stagedge can provide the support, technology, and expertise needed to make their event a success.

## WHAT'S IN A DISCOVERY CALL?

We know that your event won't be fully formed before our first call, but any information you provide will help us create a plan and pull in the right Stagedge team members.

Here's the kind of information we're looking for:

- Event dates and location
- Virtual, in-person, or hybrid
- Number of attendees
- Budget guidance
- Event objectives
- Number of presenters
- Accessibility support elements (translation or captioning)
- Technology requirements

## 2

## ENGAGEMENT: UNDERSTANDING THE NITTY GRITTY

Now that we've gotten to know each other better, we move to the pre-scope—or “engagement”—phase.

We'll schedule another call that includes more members from our respective teams—our heavy hitters. For this meeting, we'll invite senior leadership from production, technology and operations, client experience, and sales operations to our pre-scope calls. In turn, you'll invite your relevant event team leads, technologists, and marketing leadership.

This meeting will be our first opportunity to start to shape your event together. Though we haven't made a proposal or formalized our partnership at this stage, we're still happy to offer our expertise and knowledge. Unsure of the technology you'll need to engage a remote audience? We'll walk you through it. Want to understand the work that goes into a keynote presentation? We're happy to share our experience. We'll also start visualizing the set pieces and “big ticket” items, including mainstage scenic or AV elements that will wow your attendees as they walk in.





Don't worry if your team is not ready to answer all our questions or commit to certain event elements. If further discussions are needed to scope your event accurately, we have a process for working through that in our next step.

We do, however, request that all prospective clients be highly realistic about budget requirements and timelines—even during this early-stage meeting. As a result of this meeting, Stagedge will create a detailed proposal for consideration. In our proposal, we make an effort to be as transparent as possible and include all expenses upfront—including technology, travel, design, and team.

## DIVING DEEP DURING THE PRE- SCOPE MEETING

During our pre-scope meeting, we'll get into the nitty-gritty details of your event.

- Who are the key stakeholders and decision-makers for your event?
- What vendor contracts have you already established?
- What is your budget?
- Are you required to consider a certain number of proposals? Will our bid compete with other bids you're soliciting?
- What event technology are you currently using? What else do we need to understand about your infrastructure?

# 3

## SCOPING: DETERMINING YOUR PATH

By stage three, you've had a chance to get to know our teams, and we have a clear sense of your mission and what your event will involve. From here, there are two different ways we could proceed based on the complexity of your event project:

### I. A SINGLE SCOPE OF WORK

Some events are straightforward. Maybe your team has successfully executed a similar event in the past, or perhaps you're planning a short and sweet symposium. Your team has already chosen the venue, set the date, created an agenda, and invited speakers.

For events like these, Stagedge can gather all the information needed in our discovery and pre-scope calls to create a single scope of work. We'll present the scope for you to accept, decline, or offer feedback. Once accepted, the single scope of work will allow us to move quickly through event planning, production, and execution. This path is ideal for clients who are short on time or who have already completed much of the pre-planning.





## II. A PHASED APPROACH

For clients who are earlier in the event-planning process, or whose event brings along extra complexity, a phased approach is usually the better option. Rather than guessing at answers and creating an inaccurate scope just to get a contract in place, we work with our clients to divide their event planning into three phases—each with its own individual scope and recommended timeline. These phases may occur concurrently or in a different order depending on the size of the project and the needs of the client.

- 1. Securing and scheduling resources:** In order to ensure we have the necessary resources needed to make your event a success, we secure the materials, vendors, and tech support needed. We'll fine-tune stage environments (including furniture and scenic details), build an event platform to house registration and attendee tracking, and secure entertainment and speakers.
- 2. Creative development and collaboration:** We'll work with you to determine your event theme and core messaging. With that in mind, Stagedge will develop the event brand and graphic suite. We'll also conduct any site surveys needed to inform our event plan.
- 3. Event execution:** By this phase, we've ironed out the details of your event and have everything in place. All major vendors have been reserved and contracted, and the agenda has been finalized. What's left? Launching the event itself! We'll present you with a final scope of work covering event setup, execution, and production.



Phased deployment allows clients to reserve the Stagedge team for their event day—even if every detail isn't solidified. As a bonus, phases enable us to work alongside you from day one to offer guidance and help you avoid pitfalls as you determine your event strategy.



## STAYING ON TRACK WITH MONDAY.COM

Interested in how we keep all the many aspects of event planning running in parallel?

After our pre-scope call, we'll create a unique project for your event in Monday.com. The project management software aligns with Stagedge's process and helps us ensure that nothing gets lost and every detail is captured.

Stagedge clients have full access to their Monday.com project so you can follow along every step of the way, directly upload files, make comments, and review deliverables. We aim to be transparent in everything we do to eliminate unpleasant surprises for our clients.

And if you'd prefer to be more hands-off, no problem. You can be as involved in project management as you want to be. We're happy to take the reins while keeping you and your team in the loop through regular meetings.



## MAXIMIZING YOUR EVENT – EVEN AFTER THE AUDIENCE GOES HOME

Our careful discovery, engagement, and scoping process is designed to deliver you the most perfect event experience possible. As we move toward execution, we'll continue to help you refine. New ideas inevitably arise during pre-production and production, and we're always available to answer questions and provide new cost projections. Interested in having an LED feature wall to “wow” your attendees in the ballroom? Want to hire a special band? We'll tell you exactly how much it will cost to execute and offer unique differentiators that will support your event objectives and leave your audience breathless.

Post-event, we'll hold a debrief and discuss lessons learned. Many of our clients' events turn into annual or biannual cycles. We want to document your successes and key takeaways that will help us during the next go-round. We'll also finish up any video or photo projects that were a part of the event, so you can send them out to attendees.

# THE JOURNEY AND THE PROCESS

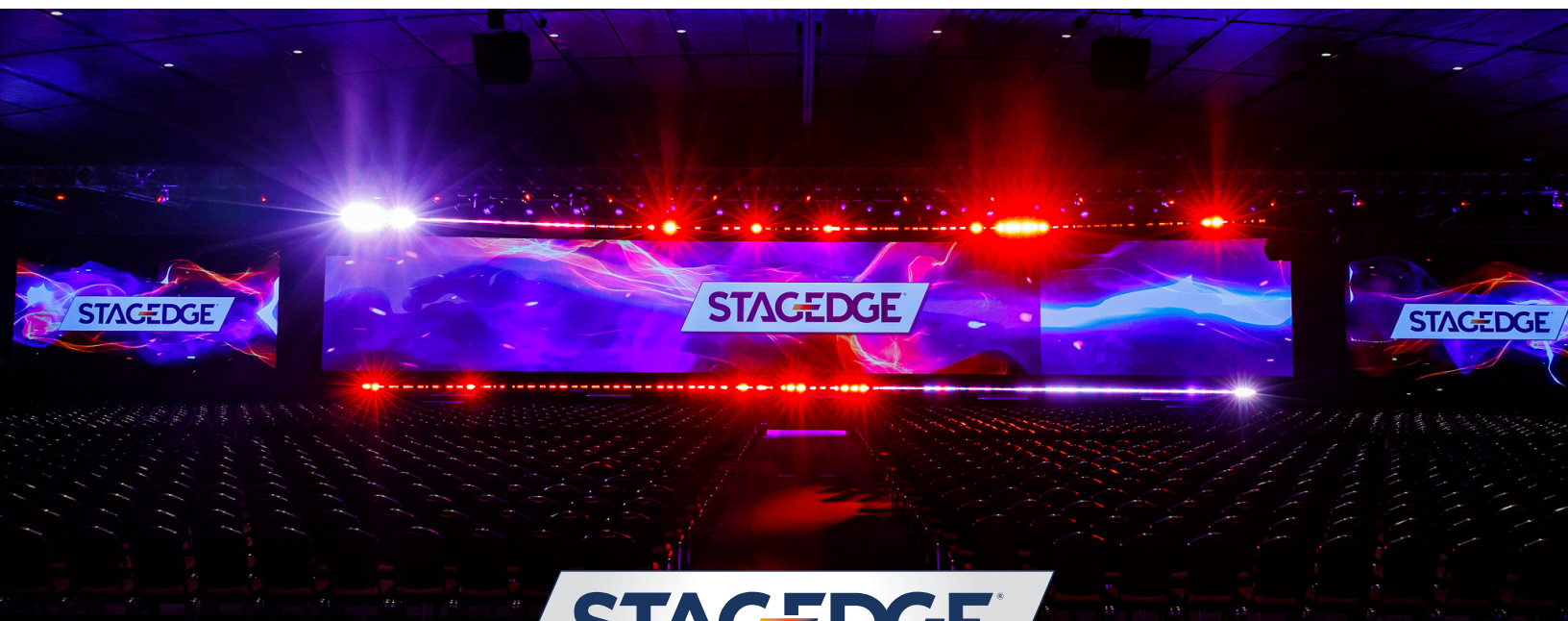
From concept to completion and everything in between, our team will work with you for the entire event lifecycle.



## COVERING EVERY STEP OF THE **EVENT JOURNEY**

From discovery call to debrief, our team is always thinking one step ahead. While we love an element of surprise in our events, there's no room for surprises in event budgeting, planning, and execution.

That's why we aim for total transparency and honesty throughout our partnership with clients, and our process is designed to ensure that our clients know exactly what to expect from their budget, from their time, and from Stagedge. Ready to set up for your discovery call? Contact us so we can learn more about you and your event. We're excited to learn more!



# STAGEDGE®

Stagedge is a leading event production provider with decades of experience helping customers from a variety of industries plan and host unforgettable events. To learn more about our offerings, visit [www.stagedge.com](http://www.stagedge.com).