

Event Management – Managing Workloads

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This guide is meant to explain how to use our various tools and platforms to organize workloads, to make sure nothing falls behind or gets missed. It's designed to address upcoming and recently completed events based on both the date of each reservation and each reservation's stage-of-life in the workflow.

Workloads should be approached with the view that **the soonest events are always the most urgent**, regardless of size or scope. To make sure the soonest events are always given attention **first**, workloads should be managed in the following order **daily**:

- 1) EMS Report (*delivered by email daily*) – INCOMPLETE Upcoming Events (stage: upcoming events to be finalized)
 - Date range: 365 days including and after Today
 - Purpose: Lists all upcoming bookings/reservations that are **not** set to **Event Ready**; the goal is for this list to always be at least a few weeks ahead
- 2) Asana (stage: events currently in planning)
 - Date range: open-ended
 - Purpose: Detailed project management for reservations to serve as an overview of currently pending tasks and to ensure all details are accounted for
- 3) Jotform (stage: new event requests)
 - Date range: open-ended
 - Purpose: Management of incoming requests
- 4) EMS [Reservation Book/Browser/Calendar] (stage: recently completed events)
 - Date range: Yesterday/recent
 - Purpose: Review the calendar within EMS and review recently completed events to begin the Post-Event Billing process (if necessary)

One effective way to manage a workflow like this is to review all items and build a to-do list each day **before** beginning work on any specific tasks. By doing this, an overview of outstanding tasks can be built, and the shortest/easiest tasks can be completed and out of the way before addressing larger things that will take more time. This also allows for tasks that need to be delegated to other people or departments to be prioritized so that multiple things can be worked on at once.