



CFA Society  
United Kingdom

# A GUIDE TO RUNNING EVENTS



# INTRODUCTION

This guide is designed to help you successfully plan, organise and manage events on behalf of CFA UK. By providing simple tips and processes used by the CFA UK events team, this guide will ensure you are fully prepared to deliver a unique event of your own.

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## EVENT QUICK START FORM

### Step 1: Events planning and budgeting

**Deadline: 6 months prior to first event**

**Detailed guidelines: Page 6**

Before your working group decides on an event, you will need to draft a skeleton plan for the year. You will need to refer back to the outline plan or task set out by your steering committee. You will then need to decide as group:

- What events you want to plan for in which quarters?
- What resource you would need to deliver those events?
- How you will plan to deliver those events on time?

Most events are run at a low cost and many are free for CFA UK members to attend. The events team can work with you to define your events budget. We support creativity so if you would like to do something a bit out of the ordinary and you think it will engage the membership, get in touch to discuss on 020 7648 6200 and select option 4 for the events team.

### Step 2: Define your event concept

**Deadline: 5 months prior to event delivery**

**Detailed guidelines: Page 7-9**

What type of event is this?                      CE                      Careers                      Diversity                      Social

If other please state your type of event here:

Delivery method:                      Live                      Webinar

Define your event's aims and objectives:

Draft event title:

Draft description:

Identify your audience - consider which jobs from the investment industry will be interested? Are they at the top of their career ladder or are they just starting out in the industry? Is your event aimed at CFA Candidates or IMC members?

### **Step 3: Identify the best event format**

**Deadline: 5 months prior**

**Detailed guidelines: Page 10**

Some events work best as a single speaker evening seminar whereas others are best as a breakfast panel. What timing and format will drive the biggest audience and engagement for your event?

Time of day:    Breakfast                      Lunch                      Evening

Duration of event:

*Our standard event timings can be found on page 10 of this guide.*

Location:        London - City                      London - Canary Wharf                      London - West End  
                          Edinburgh                      Other

Describe your format – consider whether you are having a single speaker or panel? Or maybe this is a social event with no speakers?

### **Step 4: Secure a date**

**Deadline: 5 months prior**

**Detailed guidelines: Page 11**

It's time to contact CFA UK's events team. They can help you find a suitable date and discuss how they can assist with event delivery. Call 020 7648 6200 and select 4 for the events team. Nicki or Fliss will be pleased to assist you. They will be checking what else is in the calendar to ensure you have no major clashes that would be a barrier to your event's success.

Confirmed date:

### **Step 5: Securing speakers**

**Deadline: 4 months prior**

**Detailed guidelines: Page 12-13**

Not all events have speakers so don't worry about this step if you are organising a social event, but otherwise here is some importance guidance.

- What is your speaker format - decide whether your event is best delivered by a single speaker or as a panel? Is it an interactive workshop or training event?
- Who is the ideal speaker(s) to deliver this event? Please consider their likely availability and accessibility and remember that CFA UK rarely pays speaker fees or expenses.
- Can you get in contact with the speaker and invite them? If you would like assistance or guidance, please contact the events team on 020 7648 6200 and select option 4.

Confirmed speakers:

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## **Step 6: Securing a venue**

**Deadline: 3 months prior**

**Detailed guidelines: Page 14**

CFA UK likes to work closely with firms across the sector and we are very grateful that so many of them host events for us on a complimentary basis. This is always first port of call, but we do have some limited budget to pay for venues when securing a complimentary booking isn't possible. Please take the following steps:

- Is your firm able to host the event?
- Is your speaker's firm able to host?
- Does anyone in your working group have an available space or contact?

If you need help securing a venue, please contact the events team on 020 7648 6200 and select option 4.

Confirmed venue:

## **Step 7: Marketing your event**

**Deadline 3 months prior**

**Detailed guidelines: Page 15**

The events and marketing teams at CFA UK will help you to get the word out about your event to the membership. In order to put your event online and feature it in the weekly newsletter, please email the following:

- Event title
- Event abstract
- Speaker names, job titles, company names and whether they have a CFA designation
- Speaker biographies
- Timings – registration, event, networking
- Venue name, address and capacity

## **Step 8: Event delivery**

**Detailed guidelines: Page 16**

CFA UK will support you in the lead up to your event in the following ways;

- Keep you informed with the number of bookings
- Liase with the speaker(s) on your behalf if preferred
- Liase with the venue to finalise catering, AV, set up and security requirements

You will manage the event delivery in the following ways;

- Market the event within your personal networks
- Decide who will attend from your working group and inform the CFA UK events team so we can register them
- Decide who will introduce the speaker(s) and chair the event

## **Step 9: Systems and processes**

**Detailed guidelines: Page 17**

CFA UK is currently undergoing an IT overhaul that will eventually provide the events team with effective and up-to-date event management systems. However, until then we are using a fairly clunky system that poses a few challenges to the way we do things. Please see page 17 to make yourself aware of these challenges and the processes we have in place to overcome these.

# EVENTS PLANNING AND BUDGETING

## WHO IS RESPONSIBLE FOR WHAT?

- Your group reports into a designated steering committee, which sets the overall events plan for the membership year
- Refer to your group description for the number of events requested by the steering committee
- Take the request from the steering committee and create a skeleton plan for your group to deliver to for the year ahead

## KEY THINGS TO CONSIDER:

- What have you been tasked with and what have you been allocated resource for?
- What events you want to host and in which months are you scheduling them?
- What resource do you need to deliver those events?
- How you will plan to deliver those events on time?

The template below will help you make a start on your skeleton plan. The CFA UK events team can also provide you with the master events skeleton plan on request.

Member yr Q	Month	No of events	Total per Q		
Q1	July			July	Q1
	August			August	
	September			September	
Q2	October			October	Q2
	November			November	
	December			December	
Q3	January			January	Q3
	February			February	
	March			March	
Q4	April			April	Q4
	May			May	
	June			June	

## EVENTS BUDGETS

CFA UK's staffed office creates an annual events forecast that is agreed with the board. This budget is quite limited and is based on some events being hosted for us on a complimentary basis. Contact the events team to discuss budget in detail. Before contacting them you should consider the size and scope of your event. Email [events@cfauk.org](mailto:events@cfauk.org).

Funds are primarily for venue hire fees, catering and AV. CFA UK will only pay speaker expenses or fees in exceptional circumstances - see the section on securing speakers for more information.

We are supportive of additional events that operate more independently of the staffed office. We can offer some guidance if you would like to run something less formal without a budget. Special interest groups in particular are tasked with this - you may want to consider private rooms in pubs as an example.

# DEFINE YOUR EVENT CONCEPT

Identifying the concept and purpose of your event is important if you are to deliver a successful and well-attended event. Many people dive into organising an event without stopping to consider why they are hosting the event in the first place. You should begin defining your events concept at least five months prior to event delivery.

In order to get you started, ask yourself the following questions:

- Is an event the right platform to deliver your message?
- Why are you having this event?
- Does the event reflect your group's values/mission/goals?
- What are the key things you want an attendee to walk away with?
- What does success look like?

Once you have a clear understanding of your event concept, you'll need to think about who your event is aimed at.

## EVENT AUDIENCE

Identifying your target audience allows you to tailor your event content to your audiences needs/wants. It's important to create a profile of your audience - job titles, member types, career level, aspirations etc.

- Is the event specific to your group or a small proportion of the membership?
- Does your event content overlap with another group?
- If so could you host a joint event?
- How many people do you expect to attend?

Having a clear idea of your event audience will allow you to structure and deliver engaging event content. You will also find it easier to create a compelling event abstract aimed at generating interest among the membership.



## EVENT DELIVERY METHOD

Your group has probably been tasked with creating a specific number of live events and webinars. For each concept you decide to move forwards with, you should decide if this is best delivered as a live event or webinar.

## WEBINARS

CFA UK runs a weekly Wednesday webinar at one series- many groups are tasked with feeding into this. Please ensure you refer to the objectives set by the steering committee. There are many pro's and con's to running webinars which are listed below;

### Pros

- Webinars are cheaper to run than live events
- Members can access the content from the comfort of their office/home
- They require little staff resource
- Members outside of London have access to the content
- Webinars are recorded and are available to view in our Knowledge Centre for those who missed the session

### Cons

- Opportunities for technical problems are virtually limitless
- Corporate firewalls can block the connection to the webinar and prevent some participants from downloading/accessing information
- Lack of audience interaction
- A polished speaker is a must
- No opportunity to network

Webinars are run from our London office using Adobe software, but can be logged into from anywhere. What you need to know about running webinars:

- Members sign up to a webinar in the same way they would a live event
- Registrants are sent instructions and login details the day before the webinar - registrations are closed the day before the webinar to give the events team time to create individual logins
- It is ideal if the speaker is able to come into the office to deliver the event as this minimises technical problems. However, they are welcome to deliver their webinar remotely as long as they schedule a technical test about a week prior
- Speakers should submit their slides (if any) to the events team who then pre-load the content to Adobe
- The preferred slide format is powerpoint in wide screen. Make sure that any graphs are inputted as images - if they are imported directly from Excel they will not show up
- A moderator/chair needs to be onsite to introduce the speaker and manage the Q&A
- A member of the staffed office team will run the webinar from a technical perspective, ensuring that the set up is correct and that registrants can enter the virtual room
- Webinars are usually recorded (unless the speaker requests otherwise) and the recording is uploaded to the Knowledge Centre



## LIVE EVENTS

Should you decide that a webinar isn't the right delivery channel for your event then you may wish to consider hosting a live event. If you are designing a live event you will need to consider the format options in more detail in the '*Identify the best event format*' section of this guide.

### Pros

- Live events allow for greater creativity in terms of format and delivery
- Attendees have an improved speaker interaction
- There is an opportunity to network with fellow attendees
- Attendee engagement levels tend to be higher and many find it easier to learn in this way

### Cons

- There is almost always a cost implication (whereas webinars are virtually cost free)
- Higher level of complexity - a lot more factors to consider and plan
- Limited reach - attendees are generally located in the vicinity of the venue
- More resource and time intensive

# IDENTIFY THE BEST LIVE EVENT FORMAT

If you have decided to host a live event, you will need to consider your event timings, format and location. Some events work best as a single speaker evening seminar, whereas others are best delivered as a breakfast panel.

Our live events are generally delivered in the following formats; breakfast, lunch, and evening events. The timings for which are as follows;

## BREAKFAST EVENTS

08:00 - Registration with networking breakfast  
08:30 - 09:30/10:00 - Event  
10:00 - Event close

## LUNCH EVENTS

12:30 - Registration with networking lunch  
13:00 - 14:00 - Event  
14:00 - Event close

## EVENING EVENTS

18:00 - Registration  
18:30 - 19:30 - Event  
19:30 - 20:30 - Networking  
20:30 - Event close

These are our standing event timings, however in some circumstances we can be flexible depending on the type of event you wish to host. If you are hosting a social event, your timings will vary so you'll need to discuss these with the CFA UK events team.



We tend to host the majority of our events in the evening as we find this is the most convenient time for many members to attend. Evening events seem to generate greater booking numbers and generally cost less to produce than breakfast and lunch events. However, we would still encourage you to consider a breakfast or lunch event depending on your audience and their work/life style.

## EVENT FORMAT

The most common types of events that CFA UK hosts are single speaker seminars followed by an hour's networking. When deciding on your set up, you'll need to consider how best to deliver your content. To help you decide we have listed some common event formats:

- Single speaker/multiple speaker seminar
- Panel/debate
- Interview/Q&A
- Roundtable
- Conference
- Training event/workshop
- Drinks reception
- Dinner

## LOCATION

The majority of CFA UK members are based in the City of London so this is where we will host most of our events. Depending on the content and type of event, we will sometimes host events in Canary Wharf and the West End.

Our Scottish Committee also hold regular events in Edinburgh for our Scottish members. If you would like to host your event elsewhere you may wish to deliver a webinar or if this isn't suitable, then please get in contact with the CFA UK events team.



## SECURING A DATE

What you need to know:

- The calendar is planned in line with the membership year from July to June
- We recommend running events Tuesday to Thursday and occasionally on Mondays
- Friday evenings don't work as everyone wants to go home!
- If you are running a large event and/or want staffed office support, you will need to ensure that your event doesn't clash with any other events already scheduled
- There are some headline events such as the AGM that we keep clear of all clashes

What you need to do:

- Plan as far ahead as possible - 6 months is great! We can probably still find a date 3 months out, but further ahead means more choice and more marketing for your event
- Evaluate your event needs and size - what type of support do you need?
- Contact the events team by emailing or calling using the details below
- If you have a specific date in mind the team will let you know if it is available or they can give you available dates within a range
- We cannot hold provisional dates for more than 2 weeks

Contact the events team:

Email: [events@cfauk.org](mailto:events@cfauk.org)

Tel: 020 7648 6200 (option 4)

# SECURING SPEAKERS

## TIPS ON SELECTING AND SECURING SPEAKERS

- Consider the topic as well as the speaker - have they got something relevant to say to the membership? Do they fit your event goals?
- Be realistic... but being ambitious is ok. You are probably not going to secure Warren Buffett but that doesn't mean you shouldn't ask people who may not say yes.
- When you get a no, don't get down hearted - make sure you have a plan B (and C, D and E!)
- You can make contact in a number of ways. We find that the following work well:
  - Directly is great if they are your contact!
  - LinkedIn
  - The speaker's PA
  - Via someone else at their firm
- Phone calls are often better than an email as you can give a personal touch about why you think the speaker should present to CFA UK members
- If you are struggling you can contact CFA UK and we will do our best to help you make contact

## WORKING WITH PANELS

Are you looking for one speaker or a panel of speakers?

Be careful with panels as they can be difficult to manage:

- You need a great moderator and lots of preparation - the moderator should prepare a number of questions and know the subject matter well
- Make sure the panelists know some of the lead questions
- Ensure there are a range of viewpoints - if there aren't then maybe a panel isn't the best format



## SPEAKER FEES AND EXPENSES

As a not-for-profit organisation our general policy is not to pay any speaker fees or expenses.

On occasion, we may pay for travel/hotel expenses, but this needs to be authorised by the CFA UK events team before confirming. The decision would be partly based on the speaker's circumstances such as if they are an academic.

Most speakers are happy to present on a complimentary basis because they want to be in front of an audience of CFA UK members.

Under rare circumstances, such as where a very prominent speaker is being considered that would attract a large audience, we can consider paying a small speaker fee - please discuss with the events team.

Contact the events team:

Email: [events@cfauk.org](mailto:events@cfauk.org)

Tel: 020 7648 6200 (option 4)

## BRIEFING YOUR SPEAKER

When discussing the event format with your speaker, there are a few things you'll need to cover;

- Content - agree and establish the theme and key topics they are going to cover
- Format - Is this a presentation with slides followed by Q&A? Perhaps it's an interview with no slides
- Timing - As well asking the speaker to stick to time, suggest how long they should present for and how long they should keep for Q&A from the audience
- Expectations - Ensure that you are both agreed on the content of the event so there are no surprises on the day. You will also need to ask the speaker to commit to CFA UK's high standards - you don't want their presentation to be a sales pitch

## SPEAKER HANDOVER TO CFA UK

CFA UK's events team are your experts on hand to deal with AV issues, details around locations and facilities etc. Put the team in touch with your speaker at the earliest opportunity so they can:

- Help your speaker with their technical requirements
- Let them know key deadlines
- Provide venue information
- Communicate with them about formal permissions for filming and sharing their slides online
- Set key deadlines for submission of slides

## CHAIRS AND MODERATORS

Another element you need to consider for your event is who is going to chair the event and/or moderate the Q&A.

A chair should introduce your event, provide background information on the speaker and give brief insight into what will be covered. Sometimes the chair may moderate the audience Q&A, but most of the time the speaker does this themselves. The chair closes the event by thanking the speaker.

A moderator would be appropriate for a panel event or interview and is someone who can make or break your event. It is important that you find someone who is knowledgeable on the topic, aware of the speaker and their work and has a keen interest in what is being discussed. Ideally they should meet with the speaker beforehand to go over the format and content of the event. Most importantly, they should come to the event prepared with questions, especially if there is little engagement from the audience.





## SECURING A VENUE

Our first port of call is to find out if a firm would like to host the event. Not only does this keep event costs down, but it helps us build even stronger ties with firms across the investment industry. We are really grateful to volunteers like our in-firm ambassadors who help to make this happen.

We would ask that you help us secure a complimentary space and ask you to consider:

- Is your firm able to host the event?
- Is your speaker's firm able to host?
- Does anyone in your working group have an available space or contact you could try?

When we have exhausted this avenue, we have a limited budget which we will use to secure venues.

### HOSTED VENUES

Hosting a CFA UK event can provide venue hosts with excellent firm/brand visibility, networking opportunities, and innovative content, leading industry speakers and learning opportunities directly to their business and employees.

Our venue hosts typically provide event space and refreshments on a complimentary basis in exchange for exposure and the opportunity to network with our members. We also offer 10% of our seats to the venue host which they can offer to their colleagues.

### PAID FOR VENUES

If you are unable to secure a hosted venue then CFA UK will cover the costs of securing a venue. Please contact the CFA UK events team who will find a suitable and cost effective venue for your event.

For more information or helping securing a venue, please contact the CFA UK events team.

### WHAT TO CONSIDER

- How many people are you expecting to attend?
- What room set up do you need? Theatre style (rows of chairs) is standard
- What AV do you need? For smaller events you won't need a microphone
- If a firm is hosting the event, what are their conditions and expectations? Is someone from the firm going to give a 2 minute welcome?
- What catering is needed and how are the costs being covered?
- What are the security requirements?

CFA UK's events team are here to help you with all of this, but it is useful to know what to be aware of.

### SMALLER EVENTS

Some smaller informal events, such as those organised by special interest groups, work well in a function room within a bar or pub. For further advice on how to secure these types of bookings, please contact the CFA UK events team.

# MARKETING YOUR EVENT

You want your event to be successful and that includes getting bums on seats! Let's get the word out as soon as possible and let's get people excited.

CFA UK's events and marketing teams will promote your event on our website and in the weekly newsletter, but we need your help to do so.

Your event brief should include the following:

- Event title
- Event abstract
- Speaker names (include CFA designation etc.)
- Speaker job titles and company names
- Speaker biographies
- Event date
- Timings (Registration, event, networking timings)
- Venue name and address
- Venue capacity

## WHAT WILL MAKE YOUR EVENT STAND OUT?

- The title should make it clear what the event is about
- It should also be short! But that doesn't mean it can't be interesting... think about it from the member perspective and speak directly to them
- The description should elaborate on the event title
- Ask yourself, why should someone attend this event?
- Is there something exciting, newsworthy or culturally relevant about your event? What is the context?
- What are the key learnings that someone will take away?
- Don't use too many words - keep it simple!
- Address your audience: "You will learn..."
- We recommend a word count of around 150



### Eminent Speaker: Dan Fuss of Loomis Sayles - Bond market outlook

14 September 2017, Thursday  
London

[See event](#)



## EVENT DELIVERY

Your volunteer group will have information on how many events CFA UK can assist you with in terms of staff resource, for to manage your event onsite on the day. That doesn't mean you are restricted in doing more events - we fully encourage you to host your own and can provide you with advice and training to do so.

Regardless of who is running your event on the day, CFA UK will market your event and take care of the booking process. We will:

- Keep you informed of the number of bookings
- Liaise with the speaker(s) on your behalf
- Liaise with the venue to finalise catering, AV, set up and security requirements
- Where agreed we provide the following on-site management:
  - Set up and man the registration desk
  - Ensure the venue has been set up to meet your requirements, check AV, check catering, run through timings
  - Record attendance at the event
  - Be visible during the event should members have any queries
  - Close the event, pack away equipment and ensure all guests depart on time

We ask that you manage the event delivery in the following ways;

- Market the event within your personal networks
- Decide who will attend from your working group
- Decide who will introduce the speaker(s) and chair the event
- If your speaker is selling books, ensure you have someone to facilitate this
- Inform the events team of any one you would like to register on the event early in advance
- You may also get more involved in onsite management as described above



# SYSTEMS AND PROCESSES

Any system or process can be prone to failure, but we also need to make you aware of some stumbling blocks around our current IT systems. We hope to have a new system in place soon, but in the meantime, please be aware of these factors.

## BOOKING CAPACITY AND NO SHOW RATES

Because many events are free for members to attend, we have very high 'no show' rates. This means 50% of those who booked on an event may not attend. Therefore, we overbook our events to account for this. If a room capacity at a venue is 100, we would take up to 170 bookings.

This also reflects on how we book catering. It is worth noting that not everyone arrives in time to grab a cup of tea, or has the time to stay for drink and network. Therefore, we generally cater for 50% of those in the room.

We generally find that we see better attendance rate at events that come with a fee such as half day conferences and dinners.

## EVENTS MARKED AS FULLY BOOKED

We have to 'close' bookings prior to the event for a couple of reasons. We have to check two systems against each other to be sure of our final attendee list. In addition, many venues require an attendee list a couple of days in advance. When we 'close' event bookings, the event is shown on the website as 'fully booked' even though there are usually some spaces. Understandably, this can cause confusion and frustration, but we always advise members to get in touch with the events team to find out if we can still book them on to the event.



Of course, sometimes events genuinely are fully booked and that could mean strong booking numbers so hopefully a great event! If your event is fully booked, we can create a wait list.

## WAIT LIST

A lot of our members are unaware that we operate a wait list for all of our events. If an event appears as fully booked, member's can contact the events team who will add them to a wait list. We send reminder email's three days prior to an event and this encourages cancellations, allowing us to contact those on the wait list. If the event is fully booked due to us having to close bookings for a venue, we will always contact the venue to see if we can submit an additional name to security.

## DATA

When you sign up as a member (or renew) we ask that you input your job title and company name, but many choose to leave these fields blank. The events booking system pulls data directly from the membership database. For this reason, we do not have information about the job titles and company names of those attending an event. This information may be requested by venues and/or event sponsors. We may often give a list of names only to venues for their security purposes.