



Name of Procedure	Event Brief SOP
Policy Statement	This document provides a checklist to use when developing an event brief for our clients.
Frequency of Use	Each time we receive a new client event project.

Purpose

Statement of purpose:

- To assist and clarify communication with clients regarding each new event.
- To ensure sufficient planning is undertaken for all client events.
- To be used in conjunction with Events SOP.

Policy:

Client policy for using this SOP

- It is our policy to develop an Event Brief at the outset of each new client event.
- Event brief to be drafted by Lead VA, reviewed and agreed with client and updated as needed.

Responsibility

The OBM for Your VA is responsible for ensuring that each Lead VA is aware of this procedure.

Prerequisites

- Request from client to assist with new event.

Documents referenced in this procedure:

- [Event SOP](#)
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Process steps

- **Step 1 – Draft Event Brief**
- **Step 2 – Review with client to confirm requirements**
- **Step 3 – Refer to Event Brief while planning event**

○ **Step 4 – Debrief with client at conclusion of event**

Procedure

Step 1 – Draft Event Brief

1. Lead VA to prepare draft Event Brief to include all the event details received from the client using [this questionnaire](#) which once completed can be downloaded to Excel and used as a working document.
2. [Use this link](#) to download the survey as an Excel doc.

Step 2 – Review with client to confirm requirements

1. Review draft with client to confirm requirements
2. Update brief based on client input

Step 3 – Refer to Event Brief while planning event

1. Refer to Event Brief while planning event
2. Update as needed throughout planning process

Step 4 – Debrief with client at conclusion of event

1. Debrief with client following conclusion of event
2. Update as needed for use in future event planning

Key SOP Information

Responsible for doing process	Lead VA and supporting team
Ensuring the process is done	Lead VA
Frequency	As needed

Version Control

Author:	Sue Balcomb	Approved:	Justine Parsons
Version:	1.0	Date	13/03/2018