DECEMBER 2022

EventMate

Creating an opportunity to **transform event planning** by developing a **centralized location** to connect and support **customers** and **local small businesses.**

Sarah Horowitz

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EVENTMATE

Capstone Project

Introduction

Background, problem statement, desk research and product vision.

Background

The Challenge

Create a new product in 16 weeks.

My Role

Conducted all research, UX/UI design and product strategy.

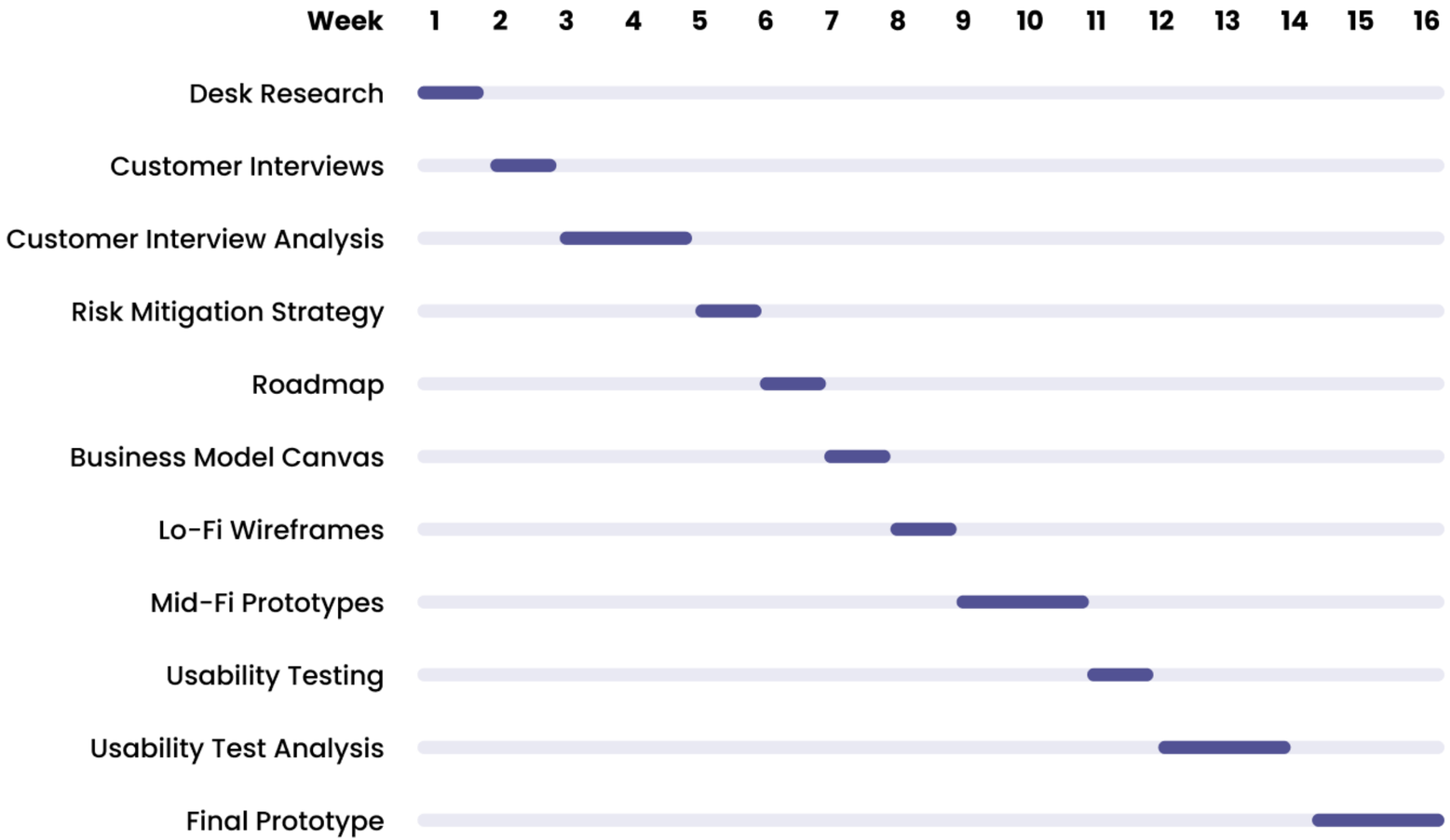
Main Tasks

- Desk Research
- Customer Interviews
- Product Strategy
- UX/UI Design
- Usability Tests

Key Deliverables

- Personas
- Affinity & Ecosystem Maps
- Journey Map
- Wireframes & Prototypes
- Design System

Project Timeline



The Problem

Connection is fundamental to our existence as people - our happiness, our mental health and our lives.

The pandemic intensified this fundamental human need, as in-person events were prohibited.

The desire to connect is sometimes outweighed by how cumbersome and complex it is to plan an event.

How might we help people plan events while keeping them organized and stress-free throughout the end-to-end process?

The Need

COVID-19

The pandemic had a detrimental impact on the event industry and small businesses worldwide.

Pre-COVID, business events alone contributed $1.5T in global GDP and $2.5T in direct and indirect spending.

How might we rehabilitate local small businesses and foster growth in the global events industry?

Values

People value human connection and enjoy supporting local businesses.

Knowing the environmental impact of events, people look to support eco-friendly businesses.

How might we connect customers and businesses with shared values?

Opportunity

With restrictions lifting, 78% of the US population want in-person events to return to a primary role.

Healthy growth is projected in the Global Event Management Platform Market and the United States Event Market.

How might we support this demand and stimulate the events economy?

Our Mission

EventMate seeks to transform **event planning** into a seamless, transparent and consistent experience by creating a **one-stop-shop** that provides users with tools, partnerships and resources to **bring meaningful moments to life** - no matter the size or occasion.

Competitive Analysis

In-platform tool consolidation improves overall efficiency.

In-platform tools will free up resources and reduce the number of additional platforms needed to plan and manage events.

Bizzabo tripleseat the knot

Customization is a value driver for vendors and customers.

Increased customization with contracts, invoices, checklists and budgets will reduce manual efforts and give users more flexibility to meet their needs.

tripleseat

A loyalty program may incentivize users to sign up for the platform.

People are motivated by loyalty programs, but they need to understand exactly how to earn and use those rewards for a positive experience.

OpenTable

Consistent and intuitive UX are imperative for user retention.

Delightful and user-friendly experiences will boost overall user confidence and generate more sign-ups for the platform.

GIG SALAD OpenTable the knot

Competitive Advantage

Centralized Location

There is a gap in the market for one platform that does it all. EventMate will support users throughout the research, comparison, booking and planning processes, while eliminating the need to use multiple platforms to plan and manage an event.

Customization

Existing platforms have little to no customization. EventMate will allow users to be in full control over budgets, checklists, contracts and questionnaires so they can tailor the platform to meet their needs.

Transparency

Current platforms provide limited insight into vendor updates, expectations and contracts. EventMate will showcase up-to-date statuses for booked vendors, average vendor response rate, cancellation policies and important contract clauses.

Small Business Friendly

Current B2B event management technologies are costly and non-user friendly. EventMate will provide additional support to small businesses, while being intuitive, easy to use and affordable.

EVENTMATE

Capstone Project

Customer Discovery

Audience segments, pre-interview assumptions and findings across audience segments.

Audience Segments

Customers

People in major US cities with disposable income to spend on events for their friends, families and colleagues.

- Social individuals who want to plan events
- People looking to support local, eco-friendly and minority-owned businesses
- For-profit corporations, non-profit organizations and educational institutions

Vendors

Small businesses in or near major US cities looking to generate leads, streamline manual processes and increase marketing efforts.

- Small businesses that provide products and services to boutique personal events
- Eco-friendly and minority-owned businesses
- Merchants looking to recuperate COVID-associated business losses

Event Planners

Boutique event planners in or near major US cities looking to generate leads, streamline manual processes and increase marketing efforts.

- Event planners with experience planning birthdays, weddings, themed parties and corporate social events
- Event planners with existing vendor relationships that are interested in developing new vendor partnerships

Assumptions

People are eager to host events, but they are overwhelmed by the amount of time and research it takes to plan them.

Since COVID-19, people are more mindful of supporting small businesses.

People want more transparency with vendors to determine if they're the right fit for their needs.

Small businesses are struggling to keep up with the current increase in demand.

It takes multiple platforms to plan an event, manage event progress and stay organized throughout the process.

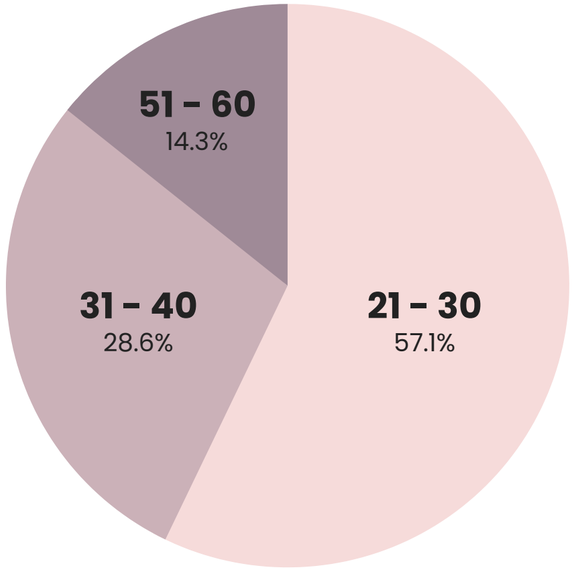
Small businesses want to invest in additional marketing efforts, but currently don't have the resources to do so.

Participant Overview

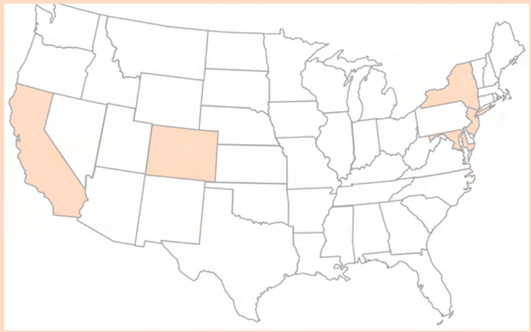
All 7 participants are **female.**

All 7 participants **planned and attended at least 1 event in the last 6 months.**

4 participants are in the **Customer** audience, and 3 participants are in the **Vendor** audience.



57.1% of participants are between the age of **21 - 30.**



42.8% of participants are located in California, while others are located in Delaware, Colorado, New Jersey and New York.

Customers

10.75 average number of **platforms & tools used** when planning events.

Customer participants mentioned a total of **30 different platforms they use when planning events.** The most commonly used platforms between the 4 customer participants are outlined above.

4/4 customer participants want a **centralized location** when planning their events.

4/4 customer participants struggle with **organizing the moving pieces** of an event and are frustrated by **how long it takes** to research, plan and coordinate with vendors.

3/4 customer participants lack trust in customer reviews and **certain vendors,** saying they don't feel real.

3/4 customer participants want more **transparency with vendor pricing** while planning events

Social Sandra

Customer Persona

Age	30
Location	Los Angeles, CA
Job Title	Executive Assistant

About

Sandra works part-time at a private equity company. She and her husband have a 2-year-old son with a daughter on the way. Sandra likes to support local businesses and is mindful of sustainability. She loves hosting parties at her house for her friends and family to celebrate every occasion. Sandra enjoys coming up with unique themes, but she needs some inspiration. She wants them to be meaningful and memorable for her guests. She is a little anxious about health and safety when planning and hosting.

Goals

- Plan and manage her themed events in a centralized location on both desktop and mobile app
- Work with responsive and high quality local businesses
- Quickly share her event's information with friends and family
- Find inspiration for unique event themes and ideas

Pain Points

- Lack of flexibility and customization with current platforms
- Time-consuming back-and-forth when talking to vendors
- Inconsistency in vendor communication style
- Lack of transparency with vendors
- Having to use multiple platforms when planning events

Current Platforms

- Gmail for communicating with vendors
- Google Sheets and Google Docs for organization
- Google for searching vendors
- Evernote for checklists and to-do lists
- Facebook for communicating with guests
- Pinterest for event inspiration

Needs

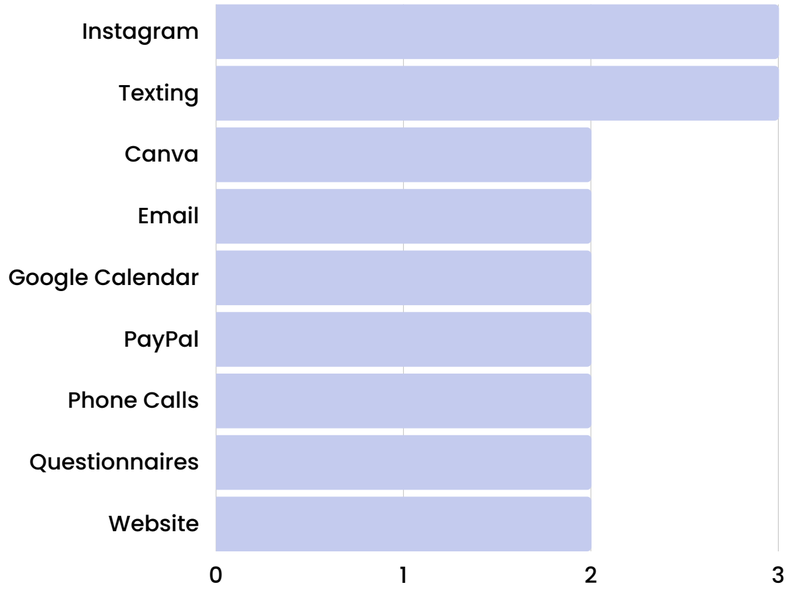
- Centralized location for planning events on desktop and app
- Vendors that fit specific criteria without lots of research
- Reminders for occasions, payments and contracts
- Status updates from vendors to eliminate back-and-forth
- Intuitive tools for timelines, budgets and vendor comparison
- Customizable dashboard to track event progress
- Customer reviews for vendors to help with decision-making

Personality

Introvert	Extrovert
Analytical	Creative
Busy	Time Rich
Messy	Organized
Tech Newbie	Tech Savvy

Vendors

10.67 average number of **platforms & tools used** when planning events.



Vendor participants mentioned a total of **21 different platforms they use when planning events.** The most commonly used platforms between the 3 vendor participants are outlined above.

3/3 vendor participants would pay for a new platform to help with **organization, communication, contracts** and **process automation.**

3/3 vendor participants find the amount of **manual processes** in planning any event to be cumbersome.

3/3 vendor participants are seeing a major demand increase as COVID restrictions lift, as their businesses are **noticeably busier this year compared to last year.**

2/3 vendor participants want to **increase their marketing efforts**, but can't due to a lack of resources.

Busy Brittany

Vendor Persona

Age	28
Location	San Jose, CA
Job Title	Partner Manager & Event Planner

About

Brittany works full-time at a tech company and plans personal and corporate events as her side hustle. She enjoys creating memorable moments. She works with a network of local businesses that she's built relationships with since starting her business during the pandemic. She has two part-time employees, but does the majority of event work herself. She uses Instagram as her marketing platform and has seen a big demand increase over the past year, which she has trouble keeping up with.

Goals

- Respond to client inquiries in a more timely manner
- Cut time spent on operations to engage more with clients
- Easily showcase her past work to potential clients
- Increase marketing efforts without spending more time on it
- Give vendors access to her schedule, pricing and inventory

Pain Points

- Lack of time, staff and other in-house resources to grow her business to full-scale
- Time and manual effort spent on invoices and contracts
- Staying organized with client and vendor communications
- Having to use multiple platforms when planning events

Current Platforms

- Gmail for communicating with clients
- Google Sheets and Google Docs for organization
- Google Calendar for client orders and team schedules
- Instagram for marketing efforts
- Questionnaires for getting client information
- Website connected to Shopify for client orders

Needs

- Centralized location for planning events on desktop and app
- Process automation for inquiries, invoices and contracts
- Integration with email, calendar and payment platforms
- Reminders for follow-ups and upcoming deadlines
- Customization with contracts to reduce manual effort
- Customer questionnaires to drill down on what they want
- Avoid reiterating client conversations to vendors

Personality

Introvert	Extrovert
Analytical	Creative
Busy	Time Rich
Messy	Organized
Tech Newbie	Tech Savvy

EVENTMATE

Capstone Project

Initial Designs

Methodology, lo-fi wireframes and mid-fi prototype.

Methodology

1. Create a **journey map** to identify opportunities for EventMate to address user pain points

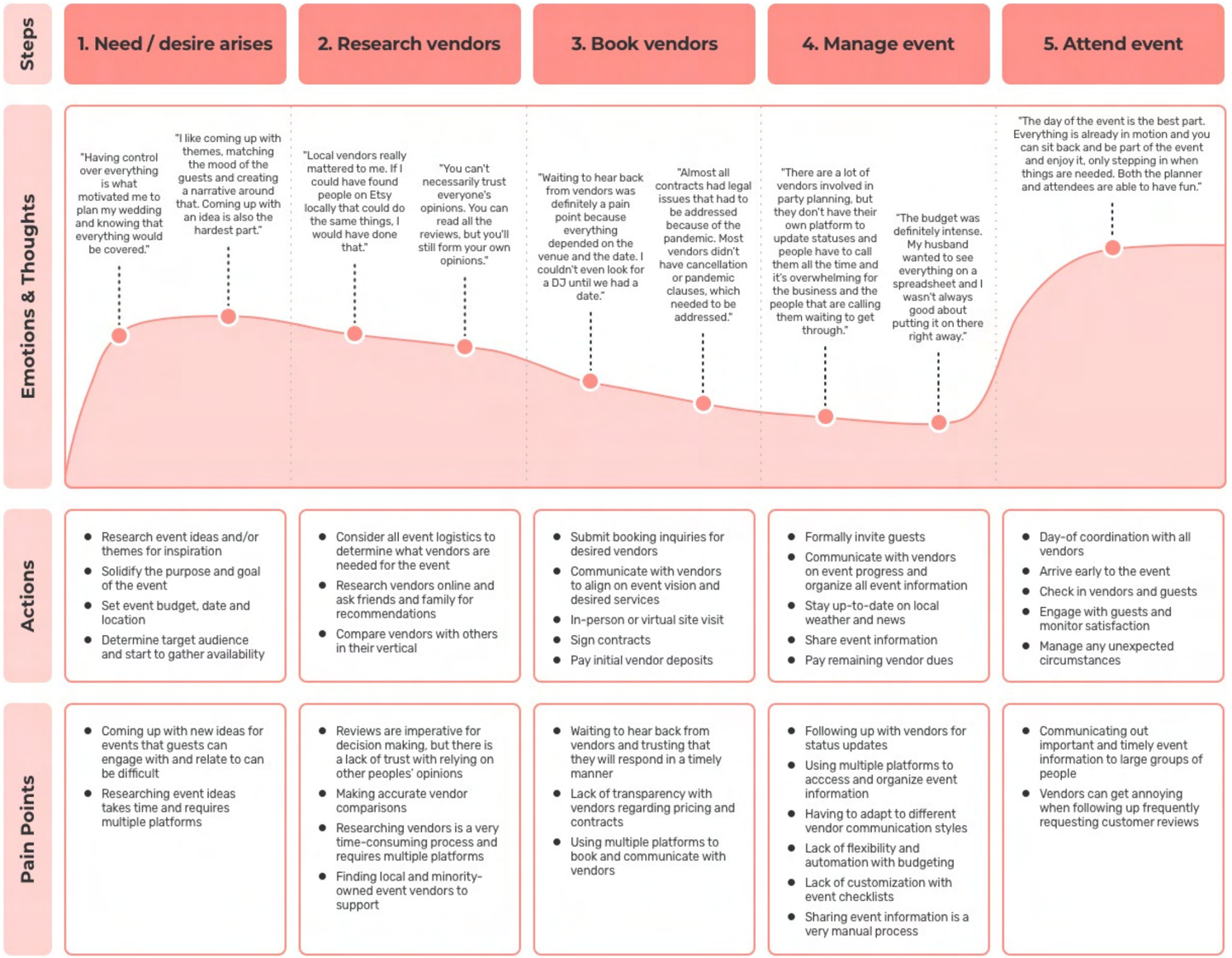
2. Create **lo-fi wireframes** for key customer tasks on EventMate

3. Create **mid-fi prototype** incorporating EventMate **branding** & **design system**

4. Conduct 5 **usability tests** with screened participants on mid-fi prototype:
    - Introduction to EventMate
    - Pre-task questions covering how participants currently feel about event planning
    - Moderated tasks on mid-fi prototype
    - Post-task questions covering overall experience and additional feedback

5. Analyze test results to develop **design recommendations** and next steps

6. Create **hi-fi prototype** incorporating feedback from usability testing



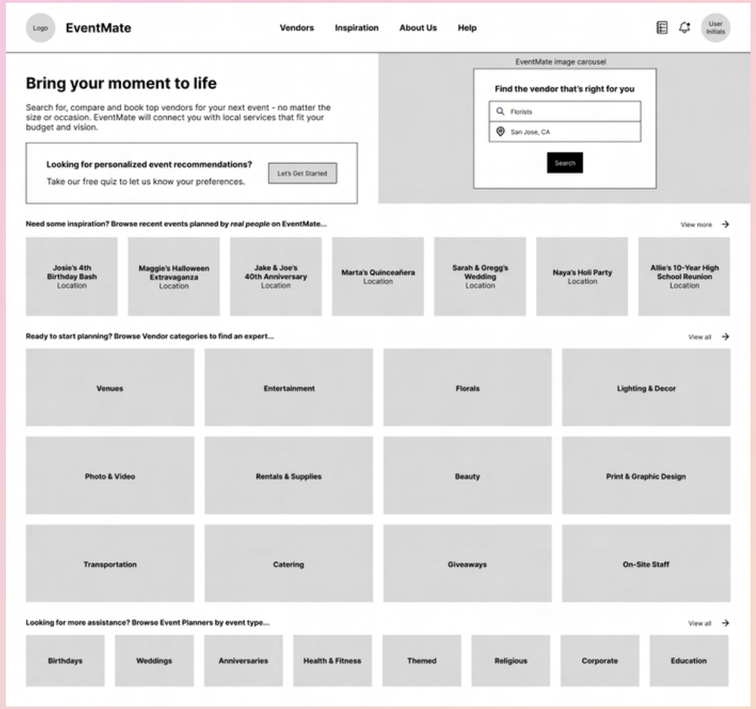
Journey Map

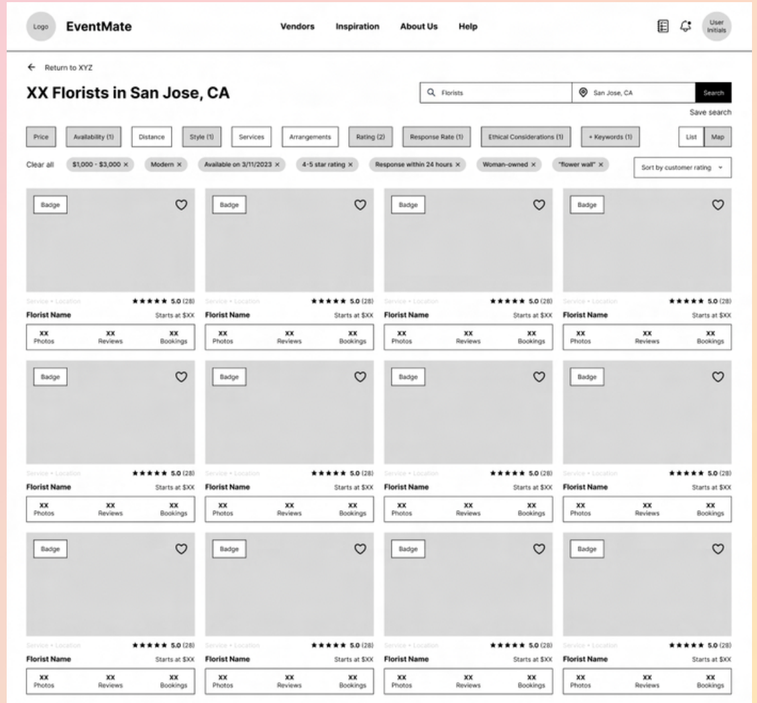
Planning an Event

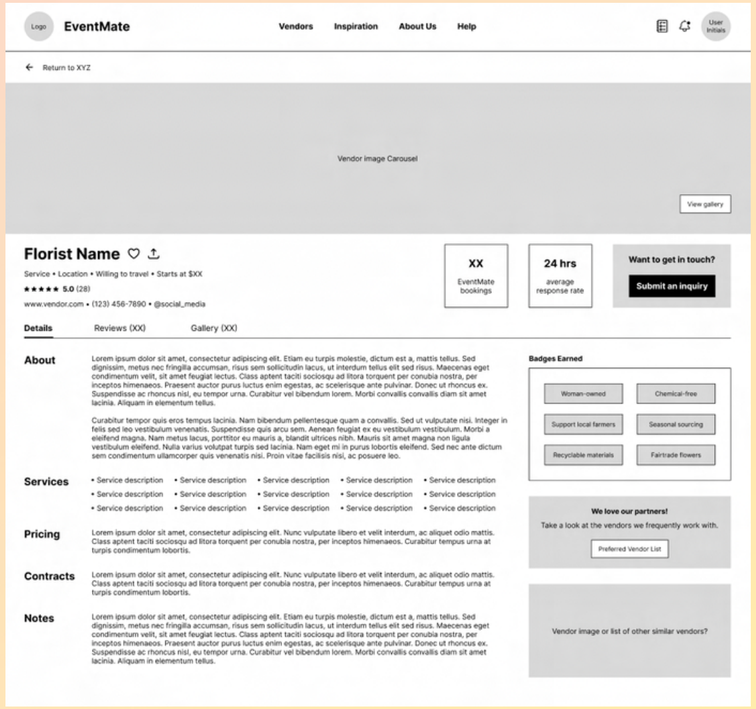
Representing the stages, feelings, tasks and frustrations throughout the event planning process for the Customer persona.

Lo-Fi Wireframes

1 Search for a Vendor







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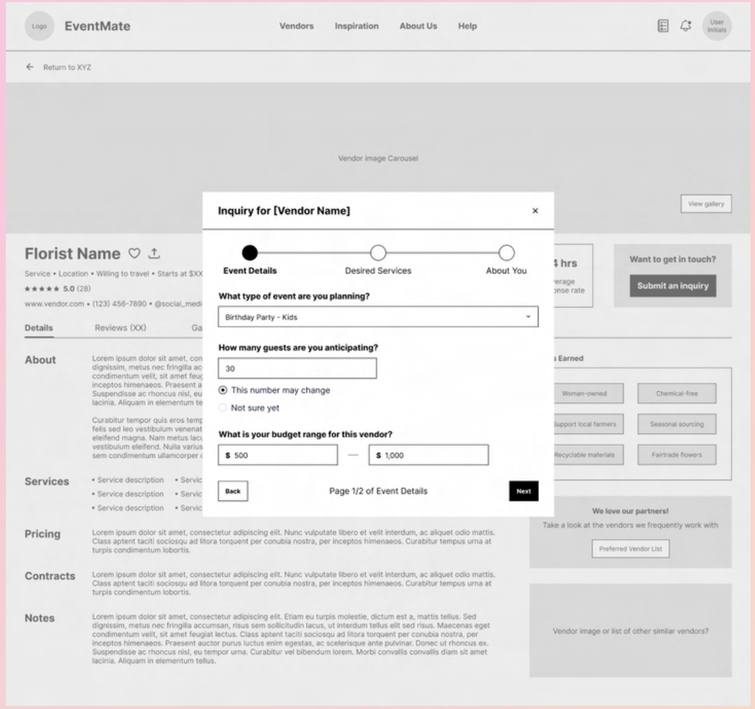
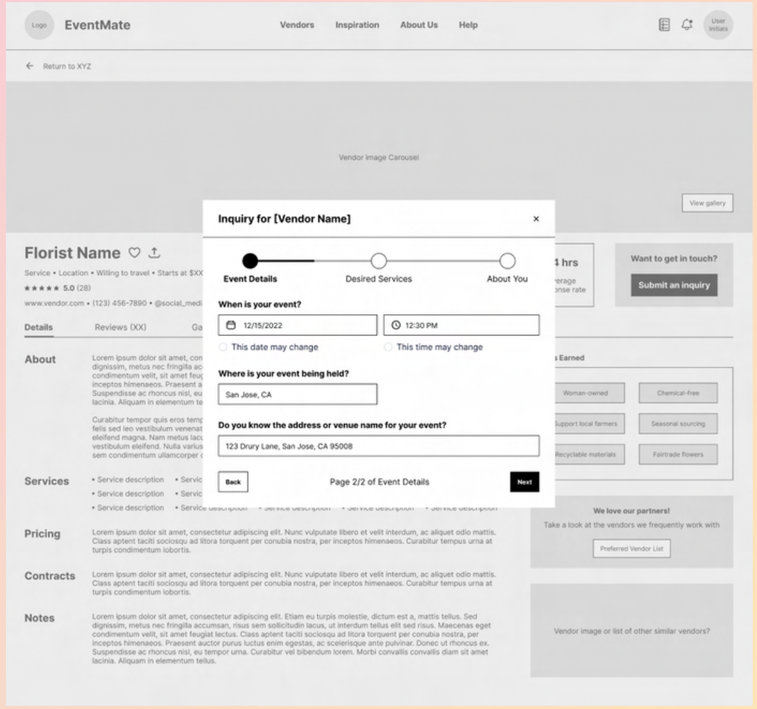
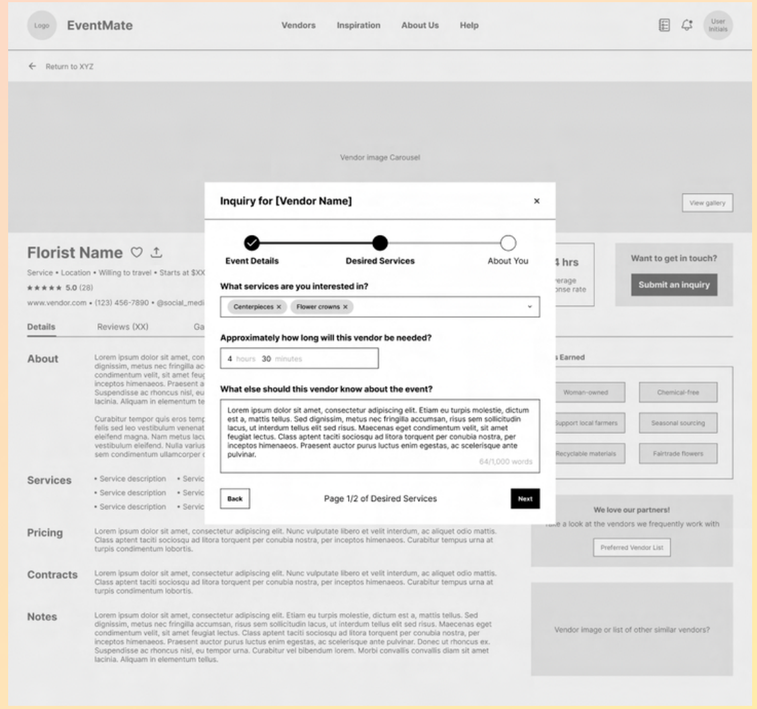
Lo-Fi Wireframes

2 Submit an Inquiry







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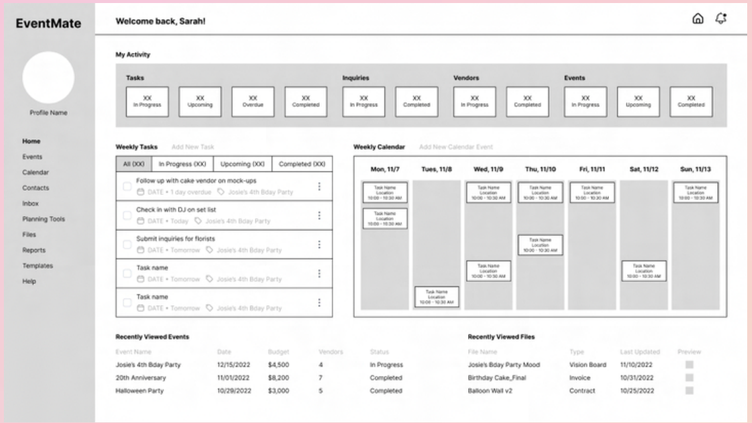
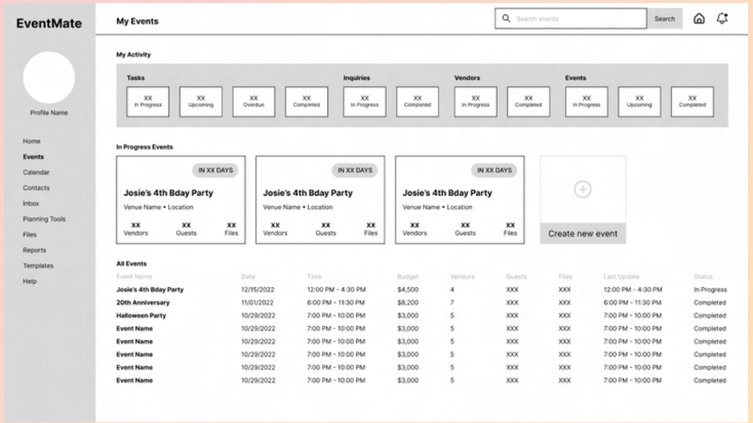
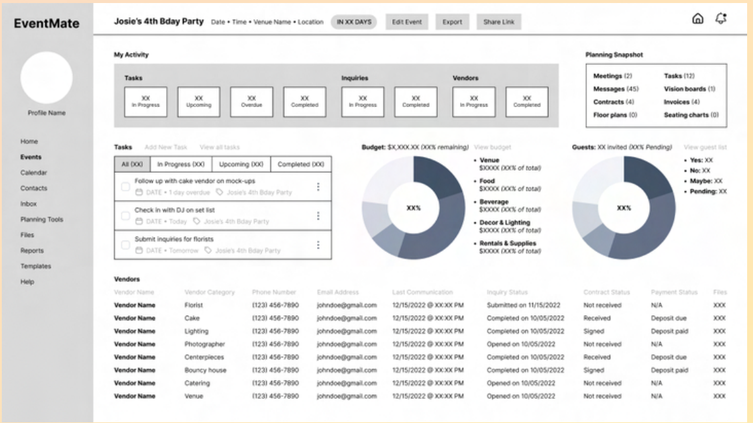
Lo-Fi Wireframes

3 View Event Progress







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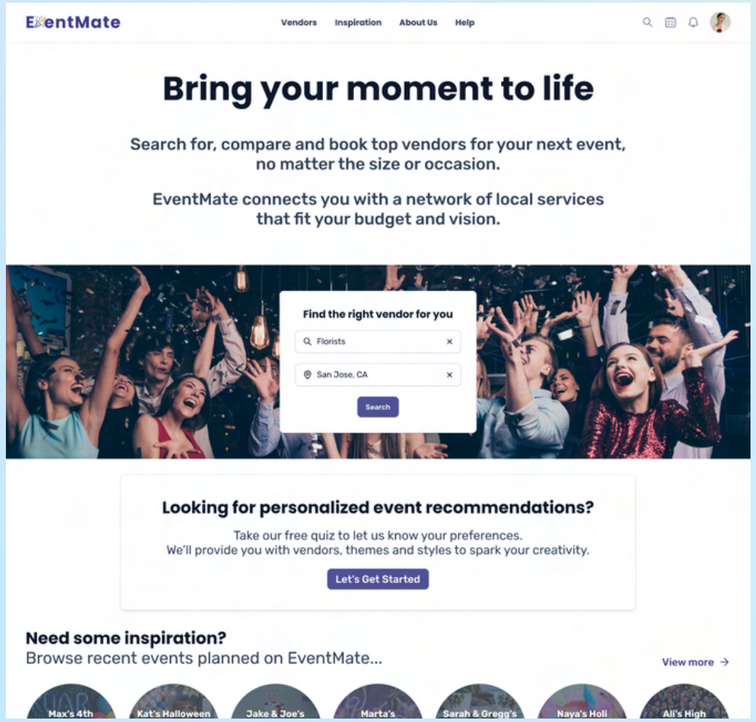
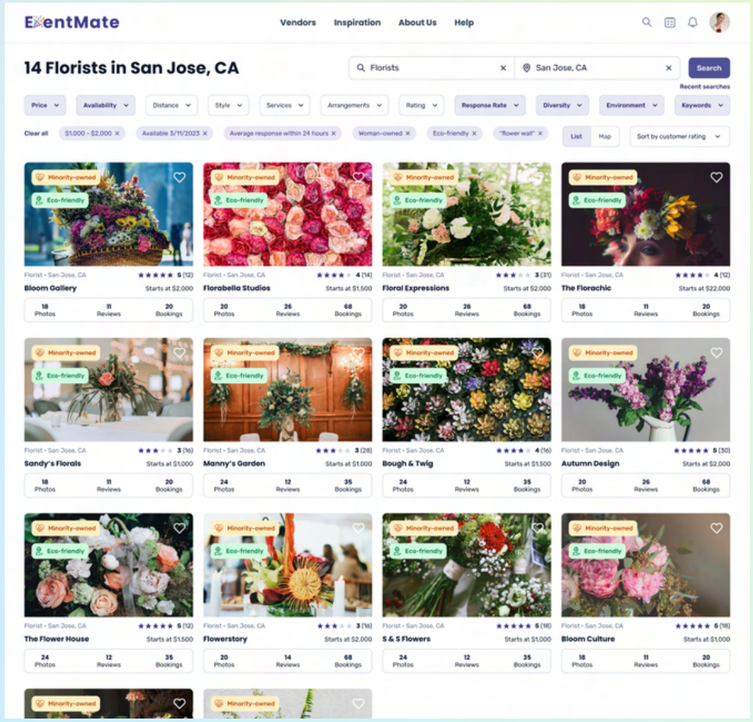
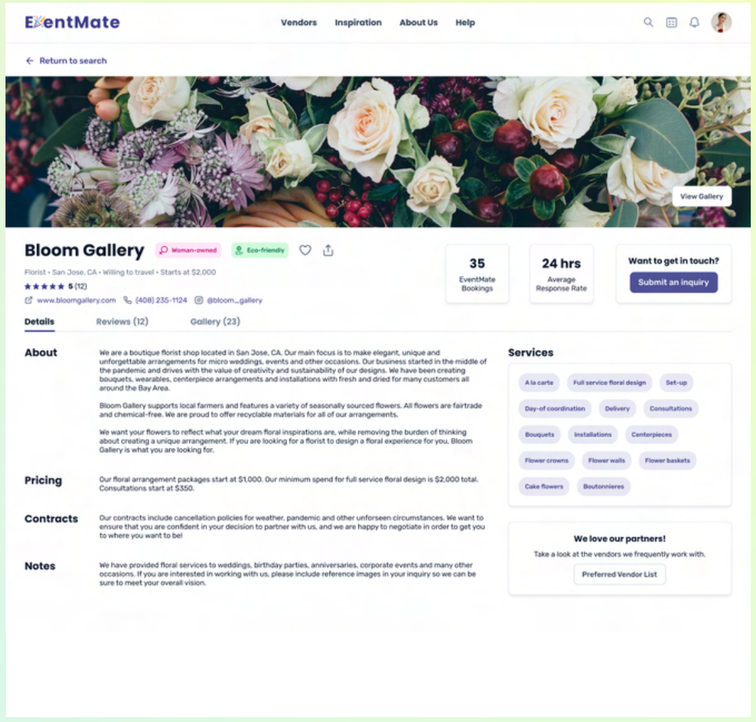
Mid-Fi Prototype

1 Search for a Vendor







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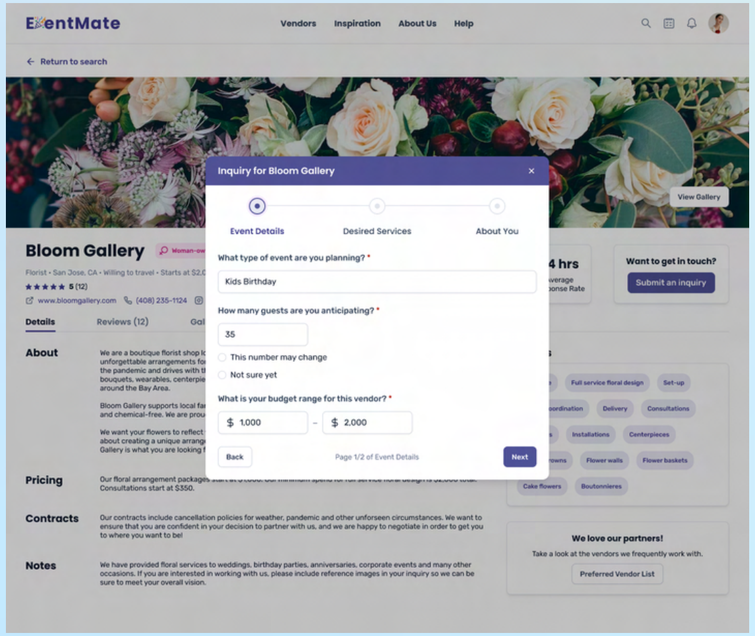
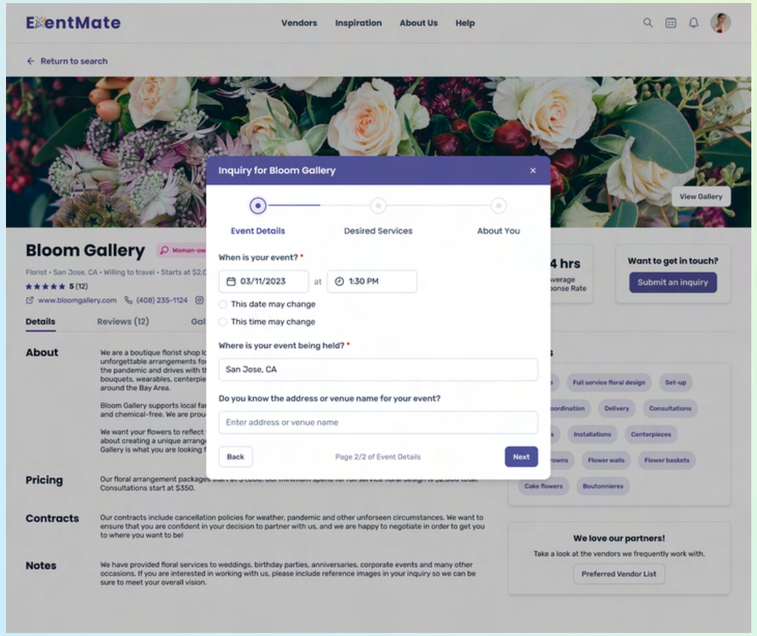
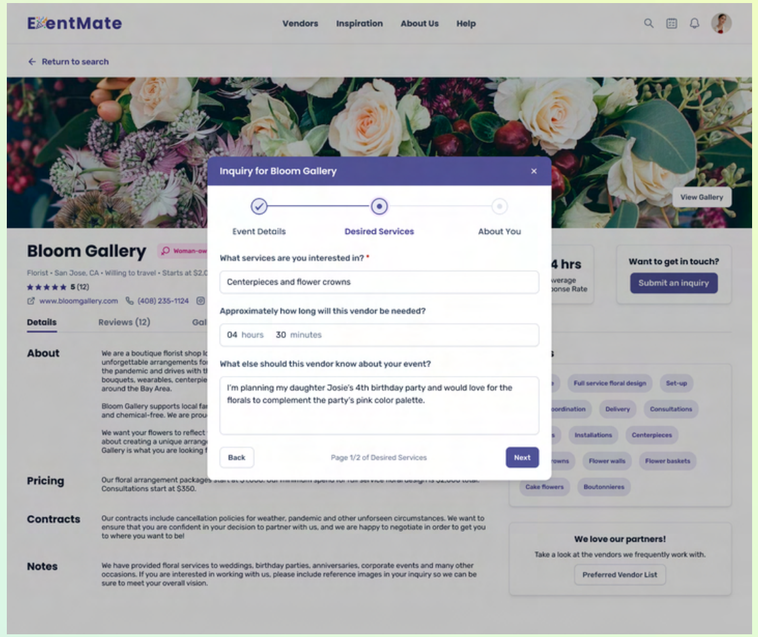
Mid-Fi Prototype

2 Submit an Inquiry

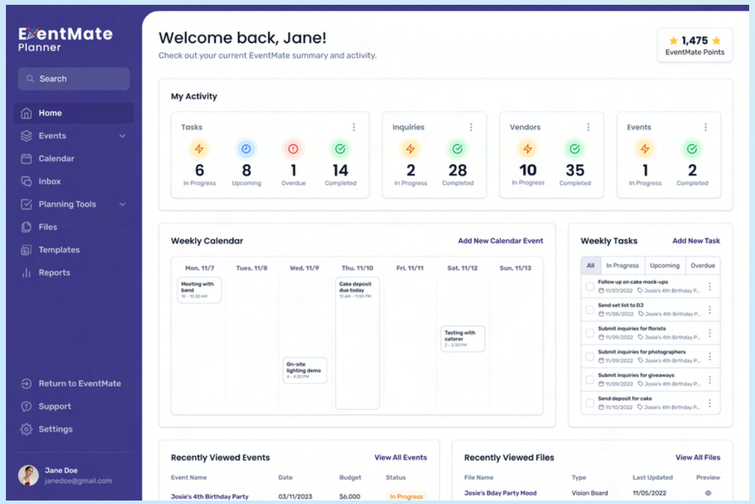


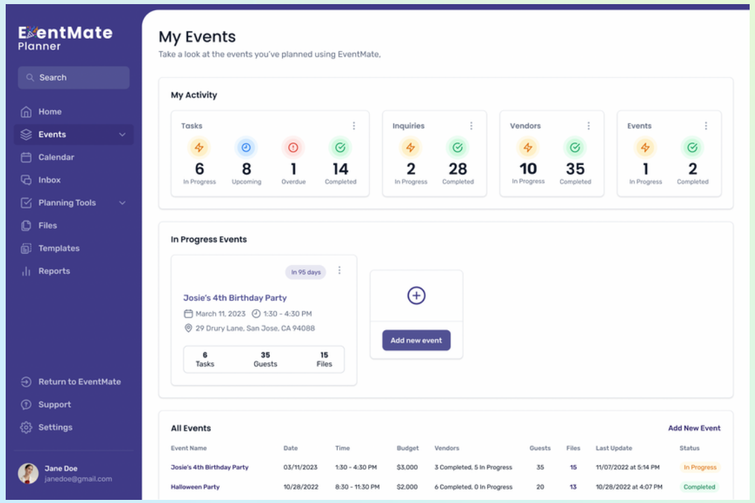


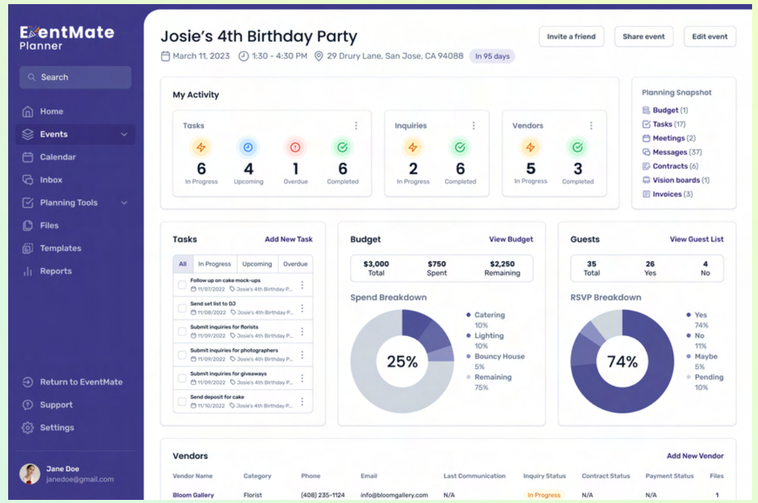


Mid-Fi Prototype

3 View Event Progress







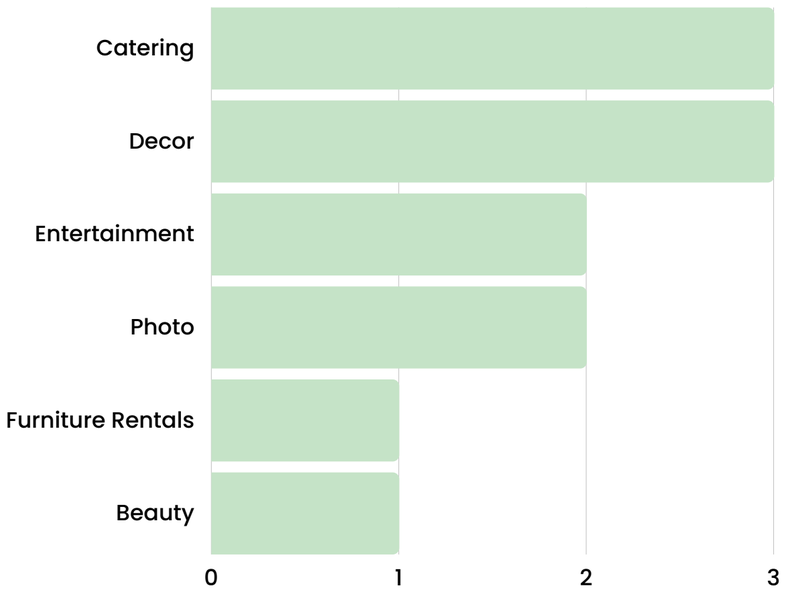
EVENTMATE

Capstone Project

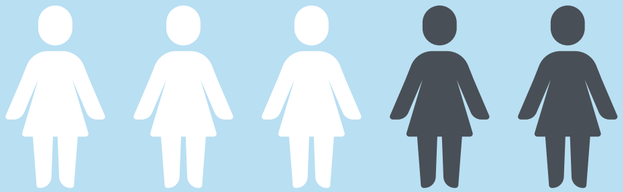
Usability Testing

Methodology, participant overview, findings and design solutions.

Participant Overview



Participants shared the **top three most important vendor categories** they search for when planning upcoming events.



3/5 participants are **female.**

3/5 participants are **ages 31-40,** while 2/5 participants are ages 21-30.

3/5 participants are planning big **birthday parties** in the next year, while 2/5 participants are planning **baby showers, anniversaries** and **weddings** in the next year.

Participants mentioned several platforms they use while planning events. The most popular were **Google** (20%), **Facebook** (20%), **Instagram** (20%) and **Pinterest** (20%).

Overall Findings

100%
of participants successfully completed all tasks

100%
of participants understood the premise of EventMate and enjoyed having all event planning needs in one place

4.8
average rating out of 5 that participants rated their experience

- **100% of participants** enjoyed having an **event inspiration** section and wanted to explore this further
- **100% of participants** liked the **variety of filters** to narrow down their search results
  - They rated **price, availability** and **distance** as their most important filters
- **80% of participants** prefer to see the **starting price** for each vendor
- **80% of participants** said that **saving inquiry responses** would save them time when submitting multiple inquiries for a vendor category
- **80% of participants** enjoyed seeing their budget, guests, vendors and quick links to planning tools in the **EventMate Planner**

Opportunities

Search

- **100% of participants** provided alternate suggestions for the **filters** to make them clearer
- **80% of participants** expected **more visuals** on the vendor page
- **40% of participants** expected **more event types** to be featured in the homepage carousel

Inquiry

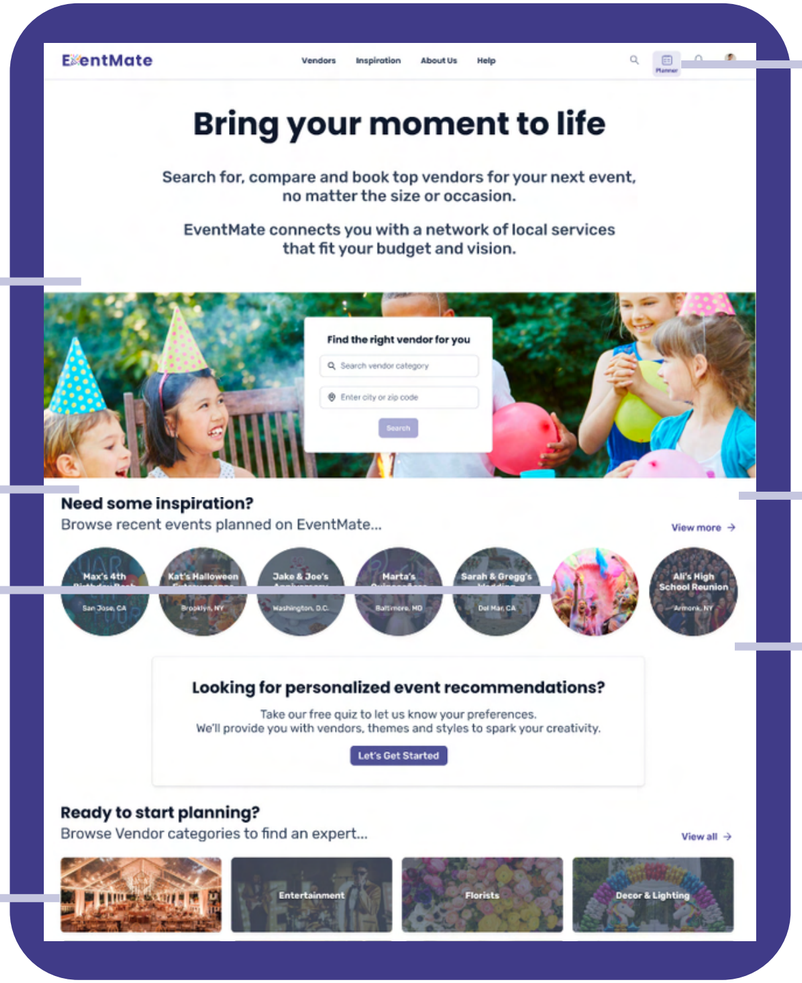
- **80% of participants were** confused by the **page numbers** in the inquiry
- **80% of participants** wanted the **success notification** after submitting the inquiry to be more prominent
- **60% of participants** felt they might not be prepared to answer **all the questions** in the Desired Services section

Planner

- **100% of participants** were overwhelmed by the **activity bar** on all pages of the EventMate Planner
- **60% of participants** were confused by the difference between **"Invite a Friend" and "Share Event"** buttons
- **60% of participants** expected the **planner icon** to be more prominent

Solutions

Homepage & Top Navigation



Showcase wider variety of **event types** and **age groups** that EventMate supports with an image carousel.

Highlight **visuals** in inspiration and vendor sections with hover states to entice users to engage further with content.

Make **icons** more prominent with hover states to reduce confusion.

Move **inspiration** next to search box to evenly break up visual content and encourage users to expand their search.

Solutions

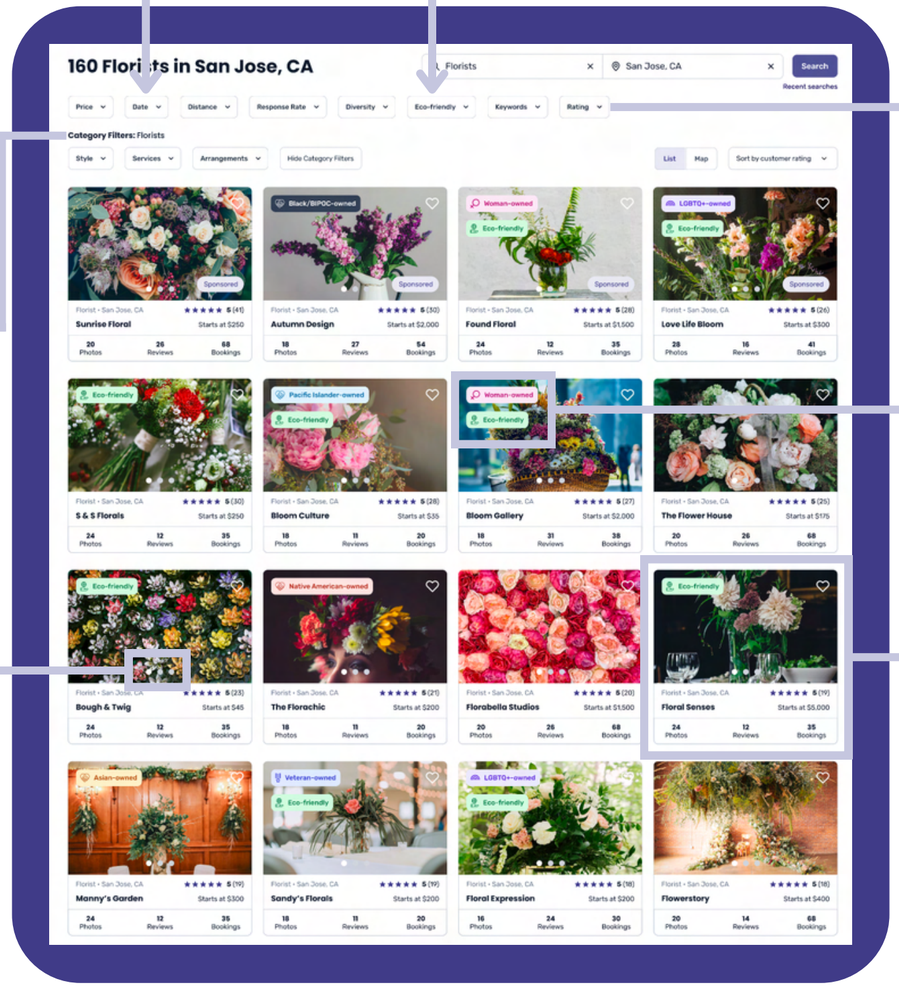
Filters & Vendor Cards

Adjust treatment of **category filters** with a separate section to reduce confusion on their purpose.

Add **more visuals** to each vendor card with carousels to facilitate decision-making and showcase vendor styles and services.

Rename to match user expectations.

Rearrange filters in order of importance and user preference.



Update **vendor badges** from Minority-owned to reflect diversity.

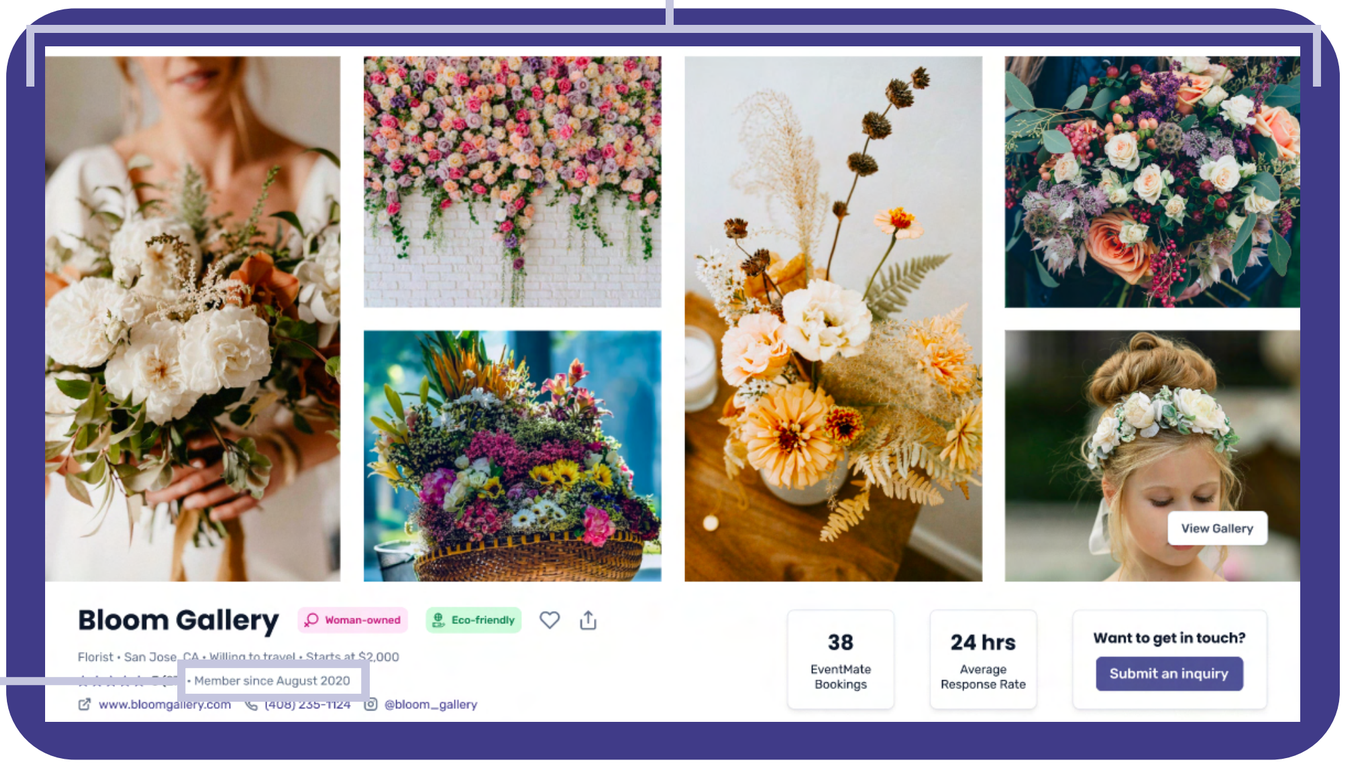
Join card together with an **outline** for clearer grouping of vendor information.

Solutions

Vendor Page

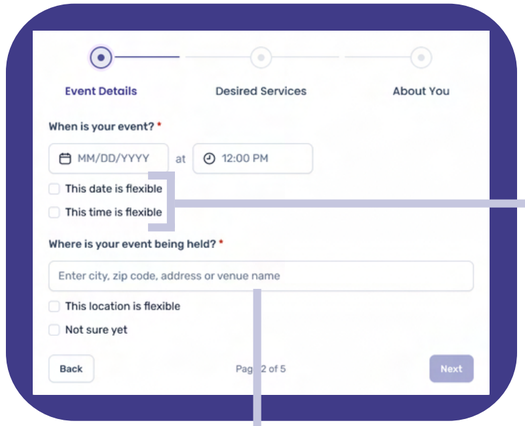
Grab user attention immediately when they land on a vendor page with **more images** in a carousel to swipe through.

Provide users with **more context on EventMate bookings** by showing when a vendor joined the platform.



Solutions

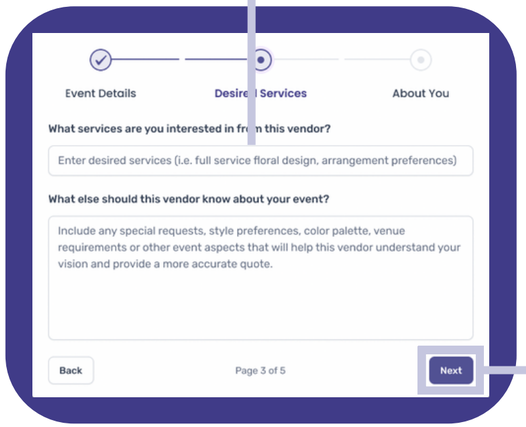
Vendor Inquiry



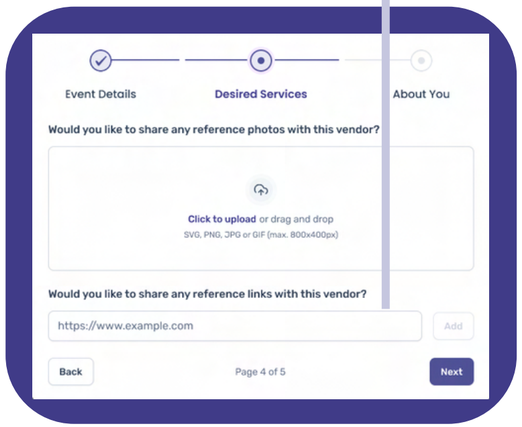
Adjust language to **This [input] is flexible** to match user expectations.

Combine **location questions** to reduce confusion and allow room for flexibility.

Update **help text** to ensure it guides users through the question.



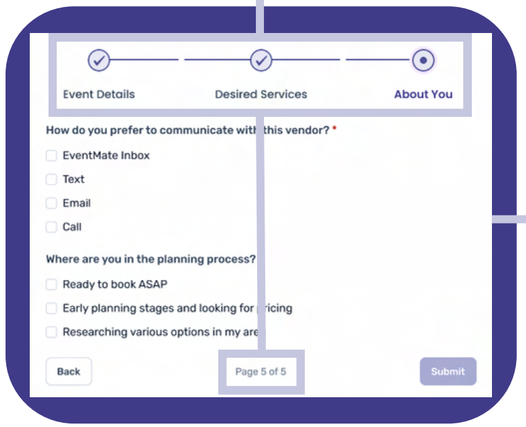
Allow users to **upload reference links** in a separate section for ease of use.



Change all questions in Desired Services to **optional** to remove any pressure on user.

Provide users with **checkbox answers** to reduce confusion and total clicks.

Simplify **page numbers** to reflect total number and add stepper breaks to indicate multiple pages.

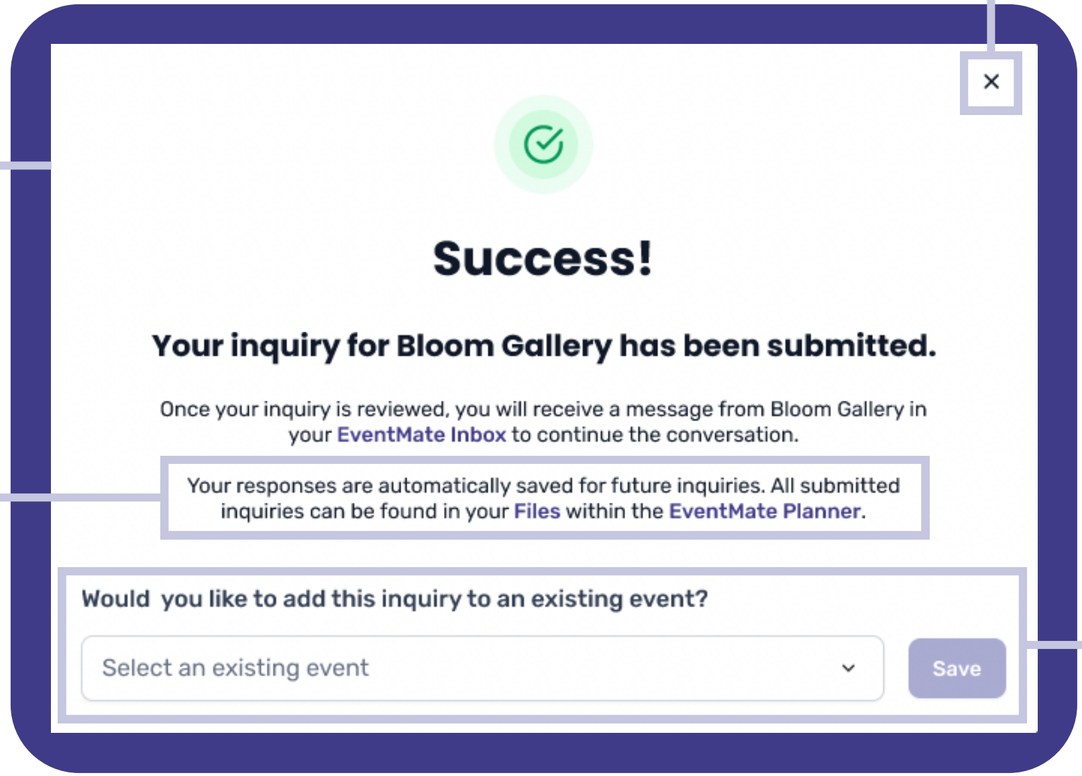


Solutions

Inquiry Submission Confirmation

Return to **vendor page** with a notification on the Planner icon when closing success modal to match user expectations.

Change confirmation format from toast to **modal** for more prominence and to allow users to learn about next steps with their inquiry.



Inform users that responses are **automatically saved** to reduce time completing future inquiries.

Move **follow-up question** to success modal to ensure users don't miss it.

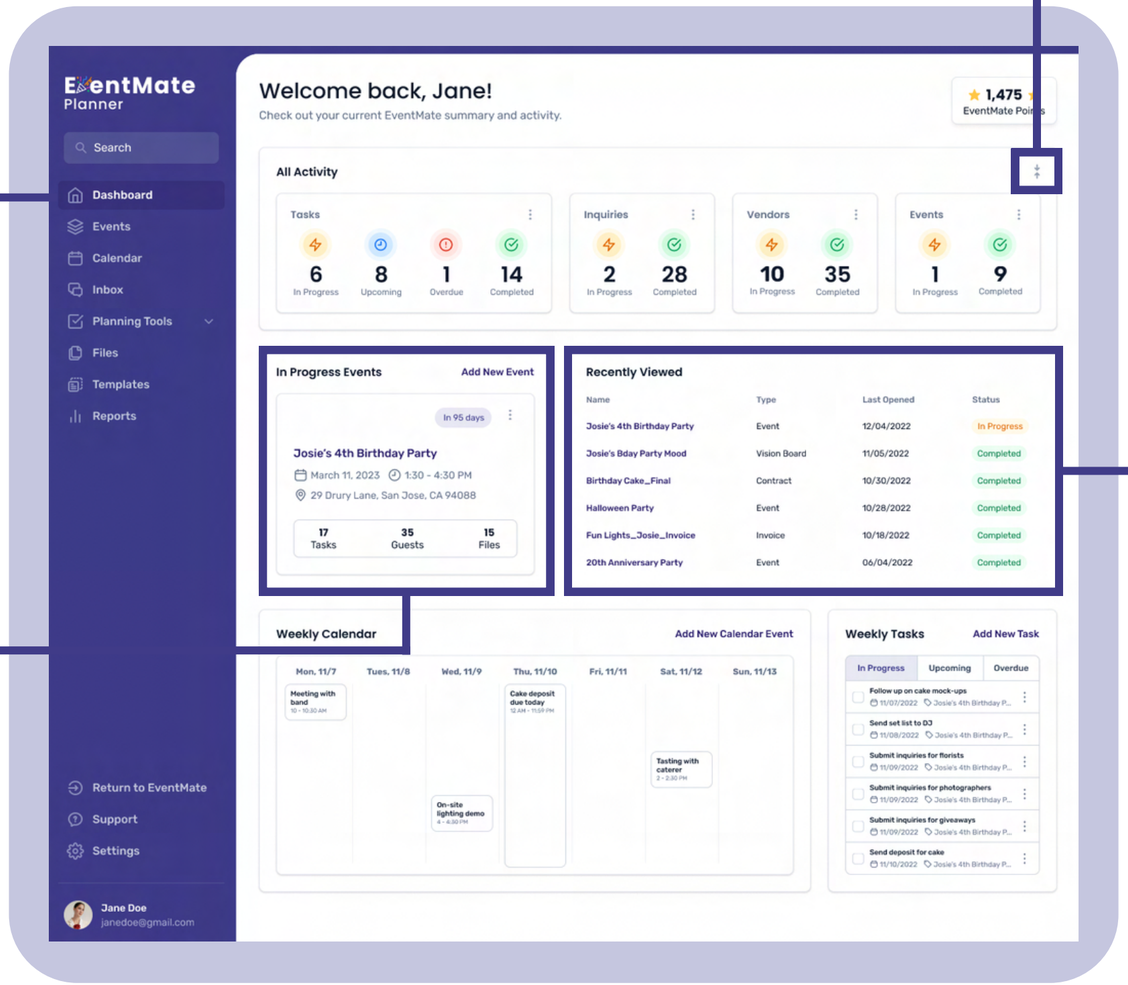
Solutions

Planner: Dashboard

Rename Home to **Dashboard** to avoid misinterpretation of EventMate homepage.

Add section for **In Progress Events** to Dashboard for immediate access.

Make activity bar **collapsable** to not overwhelm users.



Change Recently Viewed Events and Recently Viewed Files into **one list** to match user preference.

Solutions

Planner:
All Events

Remove **activity bar** to reduce confusion.

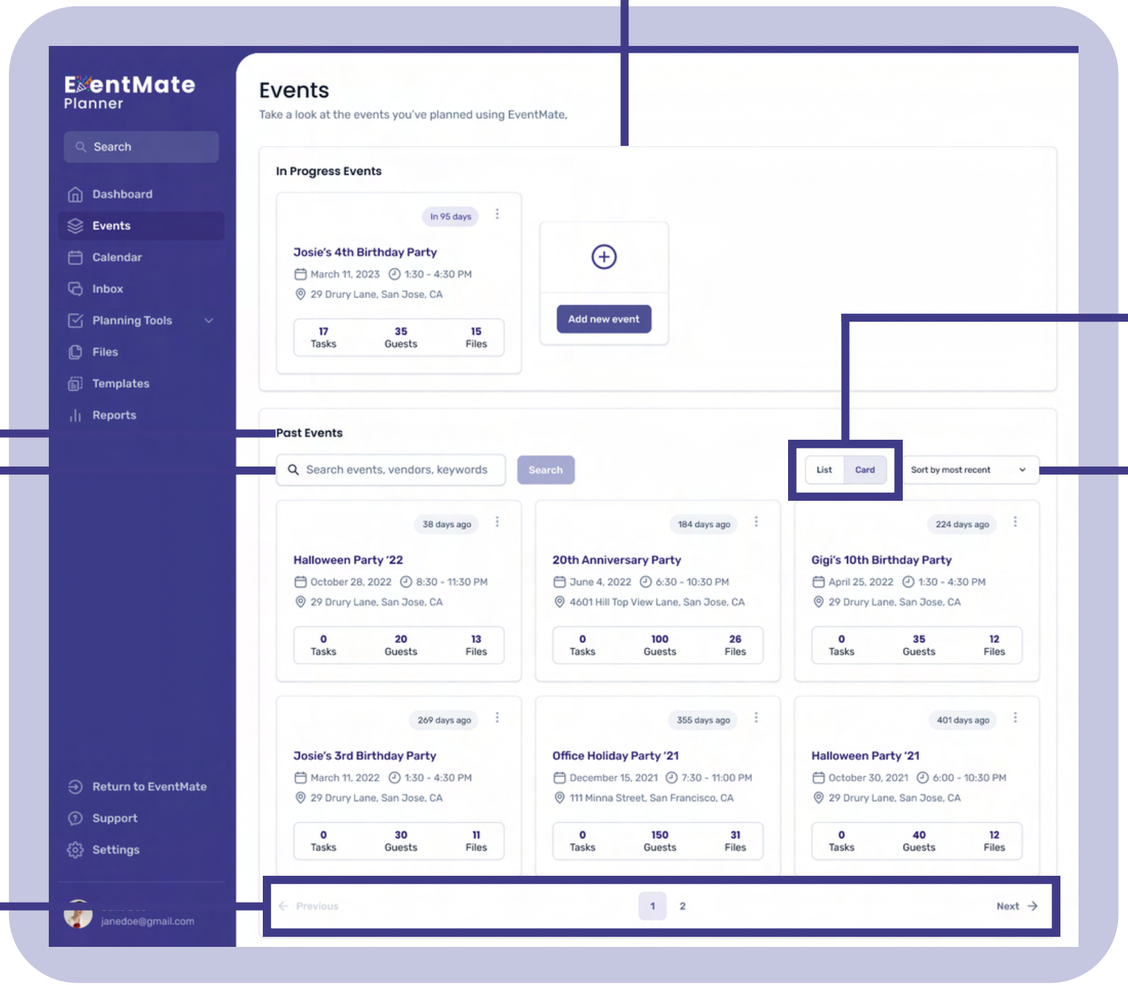
Add **card view** for alternative and more visual approach.

Rename to All Events to **Past Events** to create a clearer separation of event groups.

Add **search box** specific to events for easy navigation.

Add **sorting** for easy navigation.

Add **pagination** for cleaner navigation through events.



Solutions

Planner: View Event

Add **contact cards** for each vendor so users can quickly access desired information.

Add **search and sorting** for easy navigation.

Add **point of contact** for each vendor per user preference.

Allow users to add notes with new **Notepad** button.

Combine **Share Event** and Invite a Friend buttons to reduce confusion.

Add **dates** to provide users with more information.

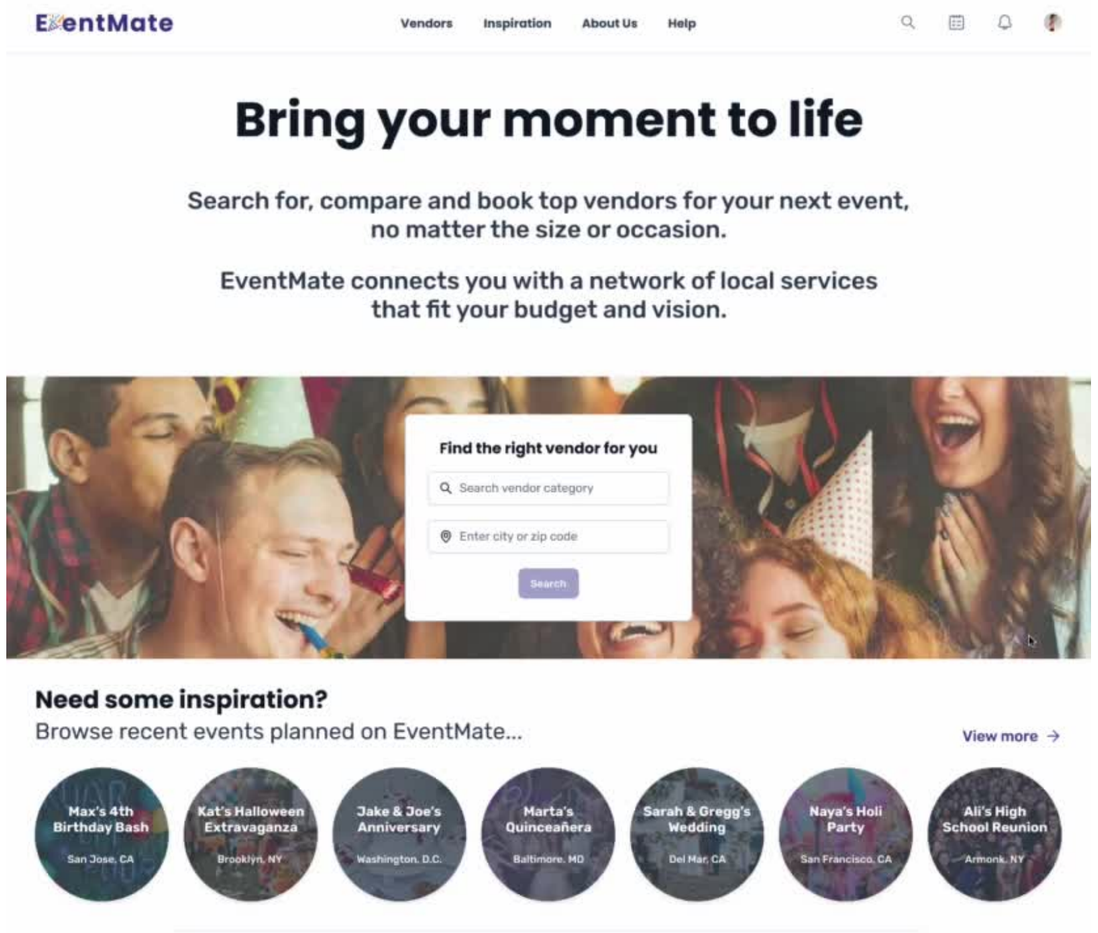
EVENTMATE

Capstone Project

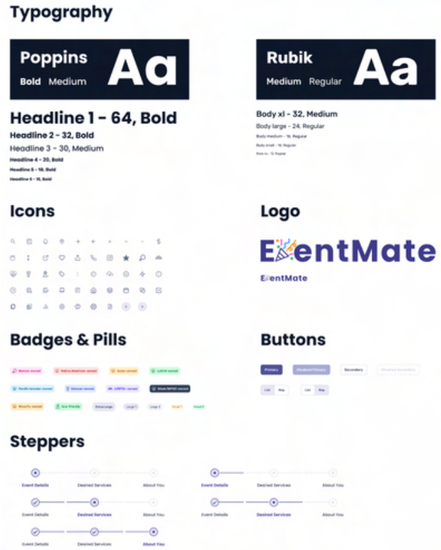
Final Design

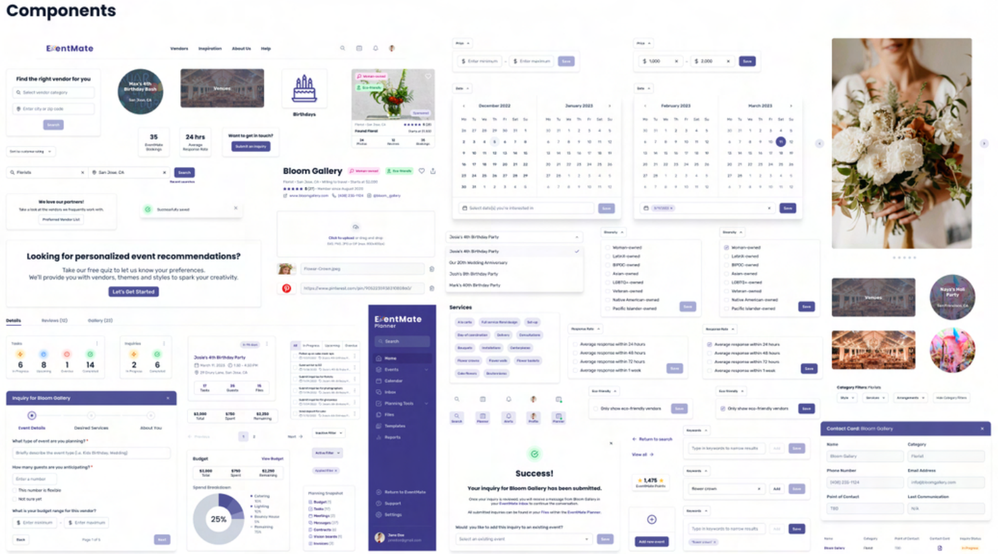
Hi-fi prototype and design system.

Hi-Fi Prototype



Design System





Capstone Project

EVENTMATE

Next Steps

Future research, design and strategy objectives.

Next Steps

Research

Interview **customers who have hired an event planner.**

Interview **professional wedding planners** and **vendors in other verticals.**

Conduct usability tests with **vendor** participants.

Design

Continue wireframing and prototyping **all customer features for MVP**.

Develop wireframes and prototypes for **vendor and event planner user journeys.**

Create wireframes and prototypes for EventMate **mobile app** experience.

Strategy

GTM strategy, including a **website** to educate future stakeholders, vendors, customers and employees on our **product, services, mission and commitments.**

Determine **membership packages** for all user groups.

Set the **revenue percentage** EventMate will take from each platform booking.

Thank You!

EventMate

Sarah Horowitz

DECEMBER 2022

EVENTMATE

Capstone Project

Appendix

Supporting research and additional data representations.

COVID-19

The pandemic had a detrimental impact on the event industry and small businesses in the United States. Small businesses experienced major resource constraints and many had to close up shop.

Pre-COVID, business events alone contributed $1.5T in global GDP and $2.5T in direct and indirect spending.

How might we rehabilitate local small businesses and foster growth in the events industry?

65.5%
of small businesses noted a moderate negative to large negative effect

87%
of event professionals cancelled events

27%
of event suppliers experienced salary reductions

43.6%
of small businesses have not received any financial aid since December 2020

14.7%
of small businesses had to permanently close a location

18%
of event suppliers had to lay off other team members

The Opportunity

$60.01B
projected Global Event Management Platform Market size by 2028 (11.5% CAGR)

$2,194.4B
projected Global Events Industry Market size by 2028 (13.48% CAGR)

$538.6B
projected US Event Market size by 2030 (13.0% CAGR)

Once the pandemic is behind us, 28% of US event suppliers expect a pent-up demand to meet face-to-face.

Now that restrictions are lifting, 78% of the US population want in-person events to return to a primary role.

There is healthy growth projected in the Global Event Management Platform Market and both the Global and United States Events Markets.

New technologies can support this in-person demand and stimulate the economy.

Macro Forces

Demographic

People are concerned about data privacy and **don't want their data and information to be shared without explicit permission.**

People are more inclined to **associate with brands that share their values.**

People value **human connection** and are looking to reconnect in the wake of the pandemic.

Economic

Recent **inflation** and fear of **recession** may cause people to be more conscious of cash outflows and engaging in social activities that cost money.

Supply and demand constraints may impact vendor relationships and the ability for vendors to provide their highest quality service

Communities with **less financial and technological resources** may struggle with platform adoption.

Socio-Cultural

People are more inclined to **support small businesses** since COVID-19.

People celebrate **cultural and religious differences.**

People are more conscious of vendors' **health and safety standards and practices** since COVID-19.

Macro Forces

Technological

Process automation and customization are value drivers for smaller vendors and independent service providers.

Strong social media presence is needed to maximize exposure, grow customer base and develop brand loyalty.

The platform must be accessible on a **desktop website and mobile application** to support people on-the-go.

Ecological

Weather and climate changes may impact reservations, cancellations and overall event progress

In-person events have a greater negative **impact on the environment** compared to virtual and hybrid events.

People need transparency around cancellation policies related to **weather and the pandemic.**

Political

The platform must be compliant with **discrimination laws**.

The platform must have a strict **privacy policy** to inform users that their data and information will not be shared.

Pandemic-related government mandates may limit or prohibit in-person events.

Trends in Macro Forces

Concerns

- Health and safety
- Data privacy
- Inflation and recession
- Supply and demand constraints
- Environmental impact of events
- Investment protection and event-related contracts

Values

- Human connection
- Shared values between brands and their customers
- Supporting local small businesses
- Celebrating cultural and religious differences
- Environmentally-friendly partners

Needs

- Process automation
- Improved customization
- Access to internet and technology
- Privacy compliant technology
- Transparency around cancellation policies

Initiatives

Consolidation

B2B event management softwares aim to **consolidate planning tools** and give businesses **full visibility and control** of related information to **streamline operational efficiencies.**

- TripleSeat
- Bizzabo
- Gather

Automation

B2M event management platforms aim to **automate frustrating and time-consuming processes** for customers by providing **planning tools** to help with timelines, budgeting, event ideas and invitations.

- The Knot
- Evite
- WeddingWire

DIY

To avoid the need for (and cost of) professional event planners, new B2M event management platforms and technologies **empower people to plan events and book vendors on their own.**

- GigSalad
- Zola
- OpenTable

Competitors

	Direct	Indirect
Strengths	• Number of partners • Brand trust • In-platform booking • Customer rewards • Charity partnership • Planning tools	• Event formats • Visibility • Tool consolidation • Event analytics • Brand trust • Integrations
Weaknesses	• Inconsistent booking experience • Low quality leads • Lack of customization	• Technical issues • Not intuitive or user-friendly • Limited customer support
Opportunities	• Partnering with venues • International expansion • Lower cost membership • Preferred vendors • Collaborative vision board	• More customization • Personal events • International expansion • Small businesses • In-platform messaging
Threats	• Competition • Oversaturation • Outsourced engineering	• Competition • Cost of technology investment

Customer Discovery Research Goals

Goal 1

Determine if people see the need for a new event planning platform.

What are current motivations, frustrations, concerns and needs around event planning?

What are the must-haves for a new event planning platform?

Would users pay for a new solution that addresses their needs and frustrations?

Goal 2

Understand how vendors feel about and approach planning events.

How are leads currently received and managed?

How are operational processes currently handled?

What tools are currently involved in growing and managing their business?

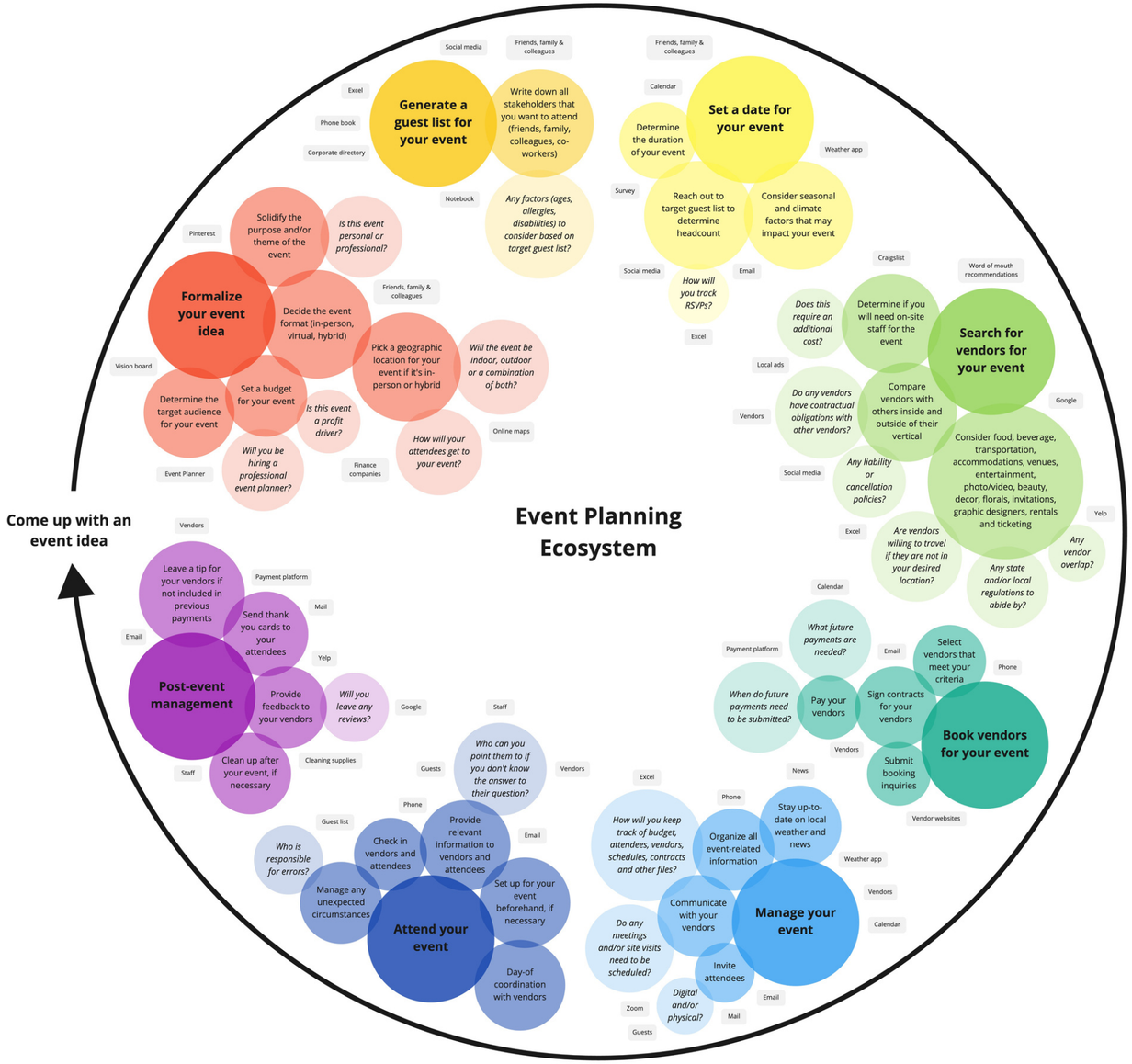
Goal 3

Understand how customers feel about and approach planning events.

What tools are currently involved in planning events?

What aspects of event planning are the most and least comfortable?

What are some concerns when planning events?



Ecosystem Map

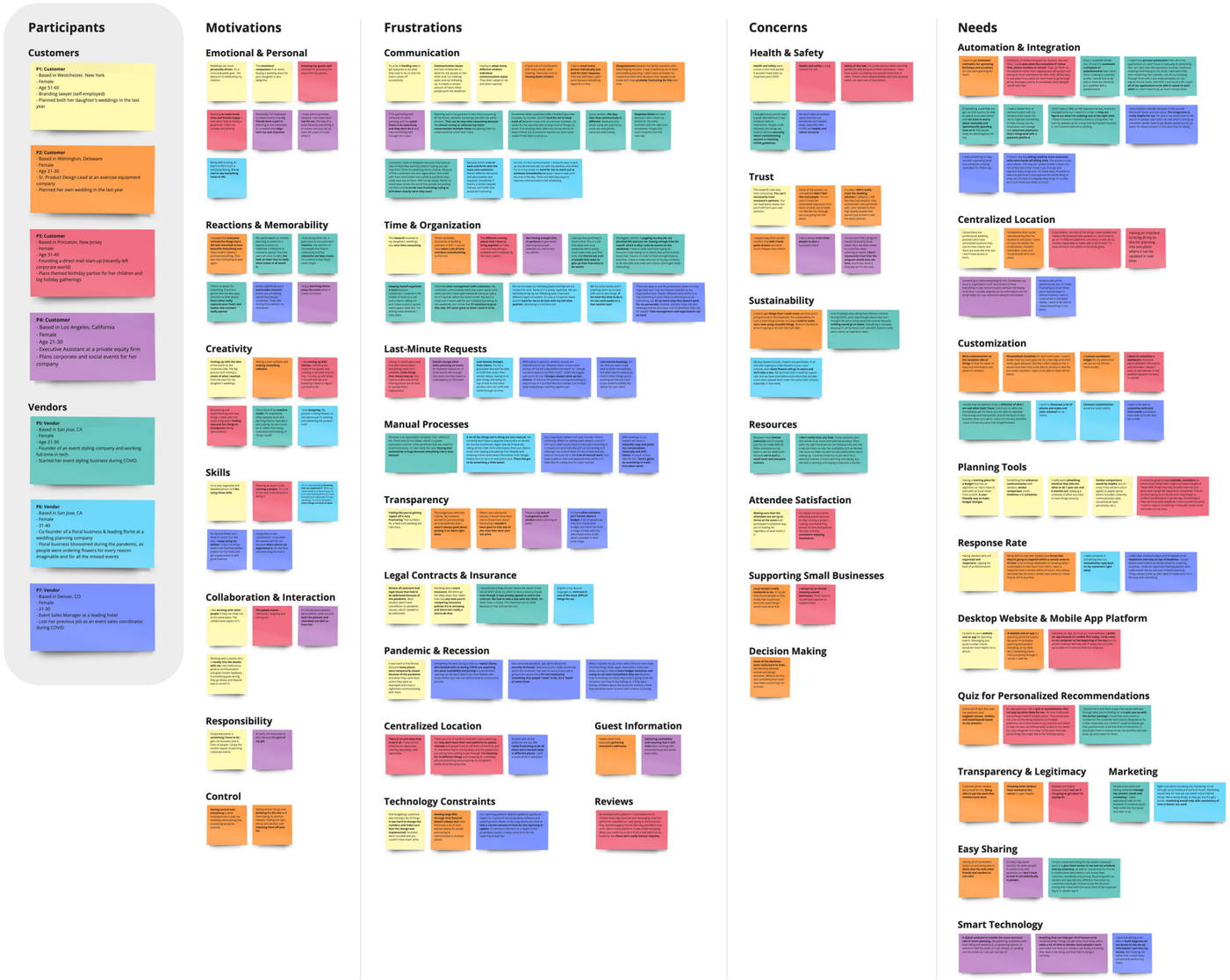
The Big Picture

Aspects involved in planning an event, including actors, processes, tools, systems, touchpoints and other related services.

Affinity Map

Motivations, Frustrations, Concerns & Needs

Discovering themes and patterns across Customer and Vendor audiences.



Key Trends

Motivations

5/7 participants enjoy the **creativity involved in planning** an event and **being inspired** by unique ideas.

4/7 participants are moved by the **emotional experience** of bringing an event to life, especially when **taking a personal interest in the event.**

4/7 participants are motivated by the **reaction of their guests,** knowing that they helped create **something truly memorable.**

Frustrations

7/7 participants find event planning to be **very time-consuming** and mentioned the **difficulty of staying organized** throughout the process.

5/7 participants are frustrated by **event-related communication,** specifically the time, effort and inconsistency.

4/7 participants noticed a **lack of transparency** when planning events.

Concerns

4/7 participants mentioned **health and safety concerns** (i.e. COVID guidelines, children's safety) when planning events.

3/7 participants were mindful of **sustainability** when planning events by purchasing **reusable items** and/or **smaller quantities of items.**

Needs

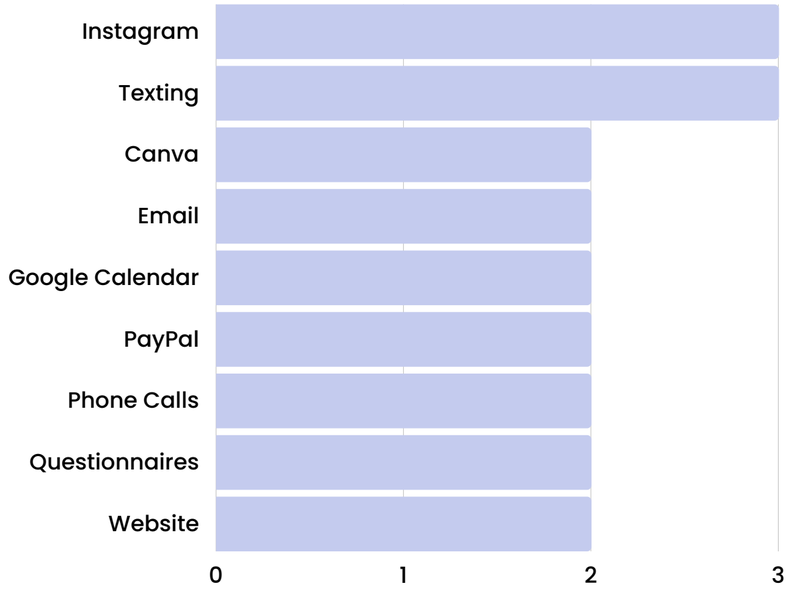
5/7 participants need a **centralized location for event planning.**

5/7 participants are looking for **more customization** with contracts, digital tools and dashboards.

4/7 participants want more **process automation** and **platform integrations.**

Vendors

10.67 average number of **platforms & tools used** when planning events.



Vendor participants mentioned a total of **21 different platforms they use when planning events.** The most commonly used platforms between the 3 vendor participants are outlined above.

3/3 vendor participants would pay for a new platform to help with **organization, communication, contracts and process automation.**

3/3 vendor participants complained about the **amount of manual processes** involved in planning an event.

3/3 vendor participants saw a major demand increase as COVID restrictions lifted, as their business is **noticeably busier this year compared to last year.**

3/3 vendor participants use **Instagram for marketing their business**, and 2/3 stated it brings in the **majority of their leads.**

3/3 vendor participants want to be able to manage their events on both a **desktop website and mobile application.**

2/3 vendor participants want to **increase their marketing efforts**, but currently don't have the resources to do so.

2/3 vendor participants plan events as their **second job** and stated that **lack of time with their busy schedules is their biggest pain point.**

Value Proposition Canvas

Vendors

Products & Services

- Platform to generate leads for upcoming events
- Receive customer inquiries and set reminders for follow-ups
- Communicate and schedule meetings with customers and vendors
- Generate and send contracts, invoices and payments
- Track booked customers, dates, payments, communication and files
- Set in-platform pricing for customers and agreed-upon discounted rates for preferred vendor partners

Vendor Jobs

- Bring memorable moments to life
- Generate new and/or repeat customer bookings
- Respond to client inquiries in a timely manner
- Communicate with customers and vendors to coordinate event details
- Create contracts, invoices and payments
- Organize all event-related information and check in on statuses
- Honor discount pricing for preferred vendor partners

Gain Creators

- Ability to plan and manage events on a desktop and mobile app
- Marketing assistance to increase recognition and bookings
- Generate questionnaires for more detailed customer inquiries
- Manage profile with up-to-date information and examples of past work
- Customizable dashboard with contact information and statuses on customer events, payments and contracts
- Integration with email, calendar and payment platforms

Gains

- Plan and manage events at home, at work and on-the-go
- Interest from customers and other vendors to generate leads and revenue
- Understand exactly what customers are looking for with events and services
- Inform customers of professional services and past work
- Have up-to-date and easily accessible information when needed
- Share information, pricing and availability with customers and vendors
- Ensure all payments are tracked and accounted for

Pain Relievers

- Centralized location to reduce time and effort spent on scheduling, invoicing, communicating and organization related to events
- Automated processes for inquiries, invoices and contracts
- Customizable dashboard to track dates and payment status
- Easy and cost-effective marketing included in membership
- Personalization with invoices and contracts
- Real-time notifications to stay in the loop with any last-minute changes

Pains

- Not being able to spend as much time with clients as desired
- Using multiple platforms for scheduling, invoicing and organization
- Spending a lot of time and effort on manual operational processes
- Keeping track of events, meetings, payments, deadlines and conversations
- Lack of time and resources for marketing and client communication
- Technological constraints with invoices and contracts
- Last-minute customer requests and vendor delays

Problem Statements

Vendors

Point of View	How Might We	Solutions
Brittany, a full-time employee and part-time event planner, needs to **spend more time engaging with her clients.**	How might we help free up some of Brittany's time?	• Automate manual and time-consuming processes • Consolidate tools to reduce resources spent elsewhere • Real-time status updates and notifications to reduce back-and-forth with customers and other vendors
Brittany, a full-time employee and part-time event planner, needs to **stay organized and keep track of all details** related to her event.	How might we help Brittany improve her organization?	• Customizable dashboard to track events, vendors, dates, payments and statuses • Centralized location for all communication • Integrations with calendar and communication platforms
Brittany, a full-time employee and part-time event planner, needs to **know exactly what her customers want** for their events.	How might we help Brittany get more detailed information from her customers?	• Customizable questionnaires for customer inquiries • Collaborative mood board to align on event vision • Showcase examples of past work for customers to reference for inspiration

Customers

10.75 average number of **platforms & tools used** when planning events.

Customer participants mentioned a total of **30 different platforms they use when planning events.** The most commonly used platforms between the 4 customer participants are outlined above.

4/4 customer participants want a **centralized location** when planning events.

4/4 customer participants struggle with **organizing all the moving pieces** of an event and are frustrated by **how much time it takes** to research, plan and communicate.

4/4 customer participants said **availability** and **photos/videos** are top factors when choosing vendors, followed by **price, comments & ratings.**

3/4 customer participants are **planning in-person events in the next year**, while the other is planning a **virtual corporate event.**

3/4 customer participants mentioned a **lack of trust with customer reviews and certain vendors,** saying they didn't feel real.

3/4 customer participants mentioned a **lack of transparency with vendors** specific to budgets while planning recent events.

2/4 customer participants want **intuitive planning tools** to help with **budgeting, vendor comparison, timelines and schedules.**

Value Proposition Canvas

Customers

Products & Services

- Platform to plan events and research, compare and book vendors
- Communicate with vendors, submit payments and sign contracts
- Provide quizzes to generate personalized event recommendations
- Customizable dashboard to track budget, details and event progress
- Planning tools for timelines, budgets and vendor comparison
- See small business, minority-owned and eco-friendly vendor badges
- Loyalty program to earn and use points towards future bookings

Customer Jobs

- Celebrate all occasions and connect with other people
- Search for and compare vendors for upcoming events
- Book and pay vendors to move forward with event planning
- Communicate with vendors to coordinate event details
- Generate ideas for upcoming events
- Track booked vendors, timelines, budget and event progress
- Support small businesses by booking local vendors for events

Gain Creators

- Ability to plan and manage events on a desktop and mobile app
- Quick and easy vendor searching with keywords and detailed filters
- Access to vendor pricing, availability and average response rate
- Access to photos and videos of past work for vendors
- Maintain customizable dashboard with up-to-date statuses on events, vendors and contracts
- Integration with email, calendar and contacts to share information

Gains

- Plan and manage events at home, at work and on-the-go
- Bring events to life by finding high quality local vendors that fit specific budget, location, availability, quality, style and service criteria
- Have a trustworthy and reliable source of information for event planning
- Be well-informed of vendors' past work
- Have up-to-date and easily accessible information when needed
- Share event-related information with guests and other people

Pain Relievers

- Centralized location to increase efficiency and reduce time spent on researching, planning and organizing events
- Consistent and agreed upon communication method(s) with vendors
- Access to vendor comments, ratings and average response rate
- Personalization with timelines, checklists and budgeting
- Set reminders for upcoming occasions, payments and deadlines
- Quiz for unique and personalized event recommendations

Pains

- Spending a lot of time and effort on multiple platforms for researching, planning and organizing events
- Inconsistency in vendor communication methods
- Lack of vendor trust, transparency and responses
- Lack of customization with event planning tools
- Keeping track of upcoming occasions, payments and deadlines
- Creative blocks when trying to come up with unique event ideas

Problem Statements

Customers

Point of View	How Might We	Solutions
Sandra, a full-time mom and part-time employee, needs to **find high quality vendors that meet her desired criteria.**	How might we help Sandra find the right vendors?	• Keyword search, detailed filters and map integration • Average vendor response rate, ratings, reviews and media • Eco-friendly and minority-owned (women-owned, black-owned, LGBT-owned, veteran-owned) vendor badges
Sandra, a full-time mom and part-time employee, needs **inspiration for new ideas for her upcoming events.**	How might we help Sandra come up with event ideas?	• Quiz to provide personalized event recommendations • Guides to help users get started • Engaging event and vendor imagery that customers see when signing into the platform for inspiration
Sandra, a full-time mom and part-time employee, needs to be able to **quickly share her event's information** with others.	How might we help Sandra share her event's information more easily?	• Integration with communication platforms • Downloadable files in multiple format options • Copy-paste functionality for contact information • Log-in for contacts to access to desired event information

Technical Risks

Technical risks include data security, data loss prevention, data intrusion prevention, endpoint protection, business continuity break fix, internal and external integrations, technical licensing, OEM partnerships and implementation.

Failure to develop the right infrastructure and integrations to support the platform while maintaining data security can lead to downtime, data leaks, loss of revenue, additional resource constraints and other legal implications.

EventMate needs to invest in the right partners, engineers and product leaders to ensure proper implementation and rollout.

External Risks

External risks include lack of customer and vendor relationships, resistance to platform adoption, economic and political instability, environmental triggers and competition.

Not enough customers or vendors will lead to a negative experience, decrease in users and loss in revenue. Environmental, economic and political uncertainty can cause event cancellations and impact vendor and customer spending behavior.

EventMate needs to support users during difficult times and expand its offerings to strengthen relationships and user retention.

Organizational Risks

Organizational risks include lack of resources, lack of communication between teams, lack of employee trainings, corporate culture and overall strategy.

These risks have major implications on how EventMate conducts its business and handles communications both internally and externally. Addressing organizational risks will reduce additional external, financial, legal, project management, reputation and emotional risks.

EventMate needs to invest in the right employees, set them up for success, improve transparency and ensure all initiatives support the platform's mission and strategy.

Project Management Risks

Project management risks include lack of product requirements and inaccurate estimates for scheduling, budget and performance.

Improper project management may cause release and expansion delays, additional resources to be acquired and damaged relationships with employees, leadership and stakeholders.

EventMate needs to facilitate cross-functional communication, ensure all estimates are accurate, have enough resources to be able to accommodate for unexpected changes and encourage relevant and timely updates to leadership.

Financial Risks

Financial risks include lack of capital investment, lack of free cash flow and increased interest rates.

Investors need to have full trust in EventMate to provide access to funds and so the platform can continue to push out releases to meet stakeholder, vendor and customer needs. Cash restrictions can lead to budget cuts and layoffs, which may bring about other project management, organizational, emotional and reputation risks.

EventMate needs to run at operational efficiency within the first 3 years to strengthen investor relationships and secure access to additional investments.

Legal Risks

Legal risks include contract infringement, data privacy compliance at the state level, employment and tax laws, licensing and end user agreements.

Failure to have the proper licensing and comply with state and federal laws puts EventMate at risk for lawsuits and major legal costs. This can cause additional financial, reputation, emotional, organizational and external risks, and potentially shut us down.

EventMate needs to have a strong legal team to mitigate any potential lawsuits and associated costs, as well as ensure vendors and customers are informed of the platform's terms and conditions.

Reputation Risks

Reputation risks include negative press, negative reviews and not meeting the expectations of stakeholders, employees, vendors and customers.

The reputation of EventMate is crucial, especially early on while still seeking investment from stakeholders. A damaged reputation can put EventMate at risk for financial, external and emotional ramifications, as negative reviews can cause subscription cancellations and ultimately a loss in revenue.

EventMate needs to manage stakeholder expectations and encourage proactive customer support to ensure user satisfaction.

Emotional Risks

Emotional risks include buyers remorse, such as customers regretting their vendor decision, vendors regretting their partnership decision and stakeholders regretting their investment in EventMate.

A lack of confidence in purchase decisions can lead to cash restrictions and subscription cancellations, which translate into other financial and organizational risks based on impacted resources.

EventMate needs strong post-purchase marketing efforts to re-affirm user purchase decisions, while ensuring stakeholders are proactively informed on the progress and ROI of all platform initiatives.

Solution Overview

Provide vendors and customers with a centralized location for event planning and management.

EventMate is a one-stop-shop that provides vendors and customers with tools and partnerships to bring memorable moments to life - no matter the size or occasion.

Increase operational efficiency for local businesses with customization and process automation.

EventMate seeks to reduce the resources needed to successfully manage and grow local small businesses so vendors can spend more time engaging with clients.

Empower customers to plan their own events with intuitive planning tools.

EventMate provides users with customizable budget trackers, checklists and dashboards to improve organization and make event planning a delightful and stress-free process.

Generate high quality leads for local small businesses.

EventMate increases brand recognition for vendors and generates incremental leads by creating a new platform for high-intent customers to find and book event-related services.

Provide customers with high quality vendors that meet their needs.

EventMate features top local businesses across an extensive category range for customers to search through, compare, book, communicate with and review.

Improve accountability and transparency around vendors.

EventMate showcases vendor badges, average response rate, pricing, availability, comments, ratings, media, cancellation policies to facilitate customer decision-making.

Desired Outcomes

Support local small businesses across the United States.

EventMate seeks to recuperate COVID-associated business losses for local vendors by generating new leads and reducing the amount of resources and platforms needed to plan and manage events.

Improve the end-to-end event planning process.

EventMate will eliminate some of the time, stress and complexities associated with events by improving transparency and providing vendors and customers with a centralized location for events.

Improve accessibility to events for humankind.

EventMate is dedicated to supporting all users by featuring an accessible color palette, screen readers, language translations and voice-activated search for hearing- and visually-impaired individuals.

Foster growth in the event-planning industry to stimulate the economy.

By improving the end-to-end event planning process, EventMate will increase the demand for custom events and support that demand increase with this new technology.

Encourage and increase human connection.

EventMate simplifies event planning to encourage the creation of personal events in order to give people additional opportunities to connect and engage with each other.

Reduce the environmental impact of events.

EventMate vendors will go through a due diligence process, and the platform will encourage customers to book eco-friendly vendors by showcasing their commitment to saving the planet.

Product Features Roadmap

P1 Must Have

Feature Name	Description	Research Validation
Log-In & Sign-Up	Users can sign up by picking their membership option and setting up a profile, or log in to their account to manage events.	Competitive Analysis, Market Research
Search Engine	Users can enter keywords to search for vendors and sort the results by desired criteria.	Competitive Analysis, Market Research, User Interviews
Filters	Users can filter searches by occasion, location, price, date, guests, environmental commitment, diversity, amenities and venue type.	Competitive Analysis, Market Research, User Interviews
Customer Inquiry	Users can submit an inquiry to vendors to begin the booking process and discuss any additional details.	Competitive Analysis, Market Research, User Interviews
Integrations	Integrations with existing customer and vendor platforms, such as email, calendar, availability, reservations and payments.	Competitive Analysis, Market Research, User Interviews
Navigation	Users can navigate smoothly and easily on the website and mobile application.	Competitive Analysis, Market Research
Payments	Users can pay deposits and installments in-platform, including the option for collaborative and split payments.	Competitive Analysis, Market Research, User Interviews
About Us	Pages overviewing all products, services, pricing and our mission to supporting small businesses and sustainability.	Competitive Analysis, Market Research
Photos & Videos	Vendors can add media to their profiles for customers to reference when researching and comparing vendors.	Competitive Analysis, Market Research, User Interviews

Product Features Roadmap

P2 Nice to Have

Feature Name	Description	Research Validation
Notifications & Reminders	Users can set notification preferences and custom reminders for upcoming dates and events.	Competitive Analysis, Market Research, User Interviews
Contract Customization	Vendors can edit existing contract templates and customize new contracts to be sent to potential customers.	Competitive Analysis, User Interviews
Comments & Ratings	Customers can view and submit comments and ratings for vendors.	Competitive Analysis, Market Research, User Interviews
Communication	Customers and vendors can message privately and in groups, while seeing vendor availability and booking meetings.	Competitive Analysis, Market Research, User Interviews
Dashboard	Users can monitor event progress in real-time with budget tracking, booked vendors and status updates on contracts and payments.	Competitive Analysis, User Interviews
Preferred Vendors	Vendors can showcase their preferred vendor list for customers to reference when looking at their information and services.	Competitive Analysis, Market Research, User Interviews
Checklists	Users can edit existing checklist templates and customize their own checklists to stay on track and organized.	Competitive Analysis, User Interviews
Vendor Badges	Vendors can showcase eco-friendly, minority-owned, women-owned, black-owned, LGBT-owned and veteran-owned badges.	Market Research, User Interviews
Questionnaires	Vendors can create questionnaires for customers to fill out when submitting inquiries for more detailed information on customer needs.	User Interviews

Product Features Roadmap

P3 Surprising & Delightful

Feature Name	Description	Research Validation
Reporting	Custom reporting for customers and vendors to export event data, and to facilitate invoicing, billing and employee payouts for vendors.	Competitive Analysis, Market Research, User Interviews
Vendor Comparison	Customers can select desired vendor criteria for an accurate side-by-side comparison to aid in decision-making.	User Interviews
Loyalty Program	Customers can earn and redeem rewards from bookings, and vendors can earn and redeem through repeat bookings and booking milestones.	Competitive Analysis, Market Research, User Interviews
Download & Share	Users can export content in multiple formats and quickly share through various platform integrations.	User Interviews
Average Response Rate	Customers can see the average response rate for each vendor to improve transparency and set expectations during event planning.	User Interviews
Advertising	Vendors can purchase advertising credits to be featured in premium sponsored placements within the platform.	Competitive Analysis, Market Research
Vision Board	Customers and vendors can create and collaborate on vision boards to ensure all parties are aligned on desired event goals.	Competitive Analysis, Market Research, User Interviews
Event Recommendations	Customers can take an interactive quiz to provide personalized event ideas and recommendations based on their preferences.	Competitive Analysis, User Interviews
FAQ	Users can reference commonly asked questions from other users and submit their own.	Competitive Analysis, Market Research

Product Features Roadmap

P4 Can Come Later

Feature Name	Description	Research Validation
Content Guides	Users can reference event guides, best practices and other related articles for educational and inspirational purposes.	Competitive Analysis, Market Research, User Interviews
Guest Log-In	Users can receive guest log-in access for specified contacts to view and edit desired event information.	Competitive Analysis, Market Research, User Interviews
Chat Box	Users can access live customer service 24/7 or during business hours, in addition to phone and email support.	Competitive Analysis, Market Research, User Interviews
Pricing Agreements	Vendors can set new and agreed-upon discount rates for their preferred vendor partners.	User Interviews
Ticketing	Users can create and send paperless invitations for their target guest list while tracking RSVPs.	Competitive Analysis, Market Research, User Interviews
Flexible Dates	Customers can set a flexible date range for vendors to increase the amount of options shown when researching.	Competitive Analysis, Market Research
Referral Discounts	Users can invite others and receive sign-up rewards to use towards future bookings and purchases.	Competitive Analysis, Market Research
Charity Collaboration	Page overviewing our charity partners and donations.	Competitive Analysis, Market Research
Newsletter	Users can sign up for recurring newsletters to stay updated on products, content, promotions, events and initiatives.	Competitive Analysis, Market Research, User Interviews

Success Metrics

Usage

- Monthly sign-ups
- Engagement (frequency of use and time spent in-platform)
- User demographics compared to target audience segments
- Satisfaction ratings and user feedback
- Monthly conversion rate of bookings
- Monthly churn rate
- Monthly returning users
- Monthly referred users

Event Stats

- Monthly events planned
- Time to event completion
- Annual cancellation rate
- Average vendor response rate

Revenue

- Annual recurring revenue
- Quarterly growth
- Stakeholder investment trends
- Stakeholder ROI

Impact

- Event completion rate
- Sustainability metrics
- Monthly incremental leads for vendors
- Monthly incremental revenue for vendors
- Share of total bookings for vendors
- Time to completed booking
- Total number of platforms used to plan and manage events
- Repeated vendor bookings

Roadmap Rollout

Year 1

Build the MVP while establishing EventMate's branding, website, marketing strategy and social media presence to generate interest from customers, vendors, employees and stakeholders.

Year 2

Test and launch the MVP with initial test market and vendor types, while hosting webinars for vendors to inform them of the platform, incentivize membership and provide educational resources.

Year 3

Secure additional funding to build and release new product features that will enhance the platform's UX, strengthen our competitive advantage, generate more sign-ups and begin to scale the business.

Year 4

Expand into new markets and vendor types to support additional local small business partners and provide customers with more options for their events. Potential to build and release virtual event services.

Year 5+

Incorporate user feedback into new product features. Run at financial operational efficiency and hire more staff. Launch community impact initiatives. Expand internationally. Go public and launch employee stock program.

Test Market

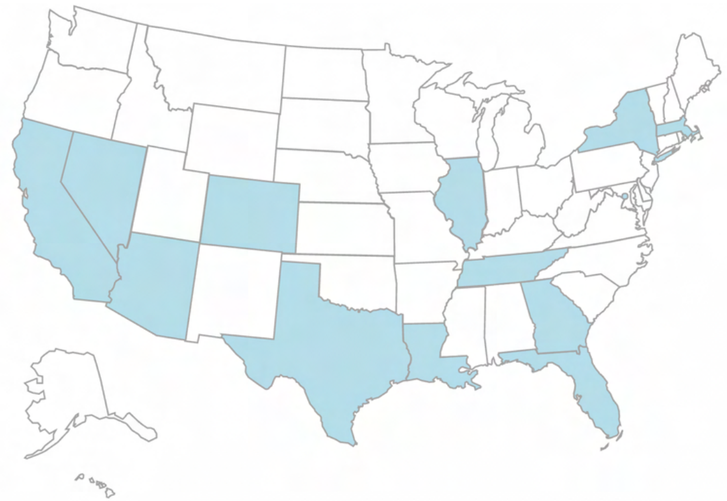
Birthdays, themed parties and weddings are the top personal event types that people are looking to plan. EventMate will partner with key vendors for these personal event types.

- Florists
- Caterers
- Decor
- Entertainment
- Event planners
- Rentals
- Photographers
- Select venue types

EventMate will focus on cities with the highest concentration of events per year.

Austin, TX	**Dallas, TX**	Las Vegas, NV	New Orleans, LA	San Diego, CA
Atlanta, GA	**Denver, CO**	Los Angeles, CA	**New York, NY**	**San Francisco, CA**
Boston, MA	Las Vegas, NV	Miami, FL	**Orlando, FL**	**San Jose, CA**
Chicago, IL	Los Angeles, CA	**Nashville, TN**	**Phoenix, AZ**	**Washington, D.C.**

*Cities in **bold** will be highly considered for the MVP launch.*



Key Partners

- Venues
- Caterers
- Transportation services
- Entertainment providers
- Photographers
- Videographers
- Beauty services
- Decor providers
- Florals
- Print & graphic designers
- Custom merch distributors
- Rentals
- On-site staff
- Professional event planners
- Ticketing service
- Virtual and hybrid event platforms
- Investors & venture capitalists
- Cancellation insurance policy provider
- OEMs (privacy compliant technology, advertising)
- Infrastructure cloud hosting service
- Payment platform integration
- Email integration
- Google Maps integration
- Calendar integration
- Calendly for availability and meetings
- DocuSign/Adobe for contract signatures
- Content partners

Key Activities

- Visual and UX design
- Platform and technology development and maintenance
- New product development
- R&D
- Sales and marketing
- Build and maintain trust and brand reputation
- Customer support
- Partner management
- Facilitate sign-ups and bookings

Key Resources

- EventMate platform (desktop website and mobile application)
- Data visualization software
- Platform architecture
- Patents, copyrights and trademarks
- Privacy policy
- End User License Agreement
- Employees (Engineers, UX Designers, UX Researchers, Product Managers, Project Managers, Legal, Customer Support, IT, Business Development)

Value Propositions

CUSTOMERS

- Centralized location for event planning
- Search for, compare and book vendors
- Photos, videos, reviews and comments
- Average vendor response rate
- Sign contracts and submit payments
- Dashboard to track event details
- Intuitive and personalized planning tools
- Consistent vendor communication style
- Small business, minority-owned and eco-friendly vendor badges
- No advertising for paid members
- Quiz for personalized event ideas
- Reminders for upcoming dates
- Communication and meetings
- Loyalty program to earn dollars towards future bookings
- 30-day free trial
- Cancellation insurance and pandemic clauses included in all contracts
- Access to preferred vendor lists

VENDORS & EVENT PLANNERS

- Centralized location for event planning
- Consolidate platforms and tools used to grow and manage business
- Automated operational processes
- Reminders and real-time notifications
- Communication and meetings
- Customize contracts and invoices
- Questionnaires for detailed inquiries
- Generate leads, contracts and invoices
- Track booked customers, dates, payments, communication and files
- Set customer pricing and discounted preferred vendor rates
- Low-cost marketing

Customer Relationships

- Direct to consumer
- Streamlined event planning and management
- Self-service with customer support
- Responsive and high quality vendors
- Trustworthy and reliable platform and vendor partners
- Maintain full control over events
- Ease of use
- Tailored to customer needs
- Free and paid membership options
- Confidence in data privacy and security

Distribution Channels

- EventMate website and mobile app
- Digital, direct mail and SEO ad campaigns
- Tradeshows and retail stores
- Social media
- Email outreach
- TV commercials
- Content, influencer and event/charity sponsorships
- Webinars for local small businesses
- Personality endorsements
- Public relations
- Word of mouth
- Mobile app stores

Customer Segments

CUSTOMERS

- Disposable income to spend on personal events
- Social individuals ages 21-60 who like to plan events
- People wanting to support small businesses
- Parents/guardians looking to plan events for their children
- For-profit corporations
- Non-profit organizations
- Educational institutions

VENDORS

- Local businesses in or near major US cities across 12 event-related verticals (overview on next slide)
- Vendors looking to generate leads
- Small businesses looking to streamline manual operational processes and increase marketing efforts at a low cost
- Small, eco-friendly and minority-owned businesses

EVENT PLANNERS

- Boutique personal event planners
- Education-related event planners
- Small scale corporate event planners
- Large trade show planners
- Fundraiser, gala, networking and charity event planners
- Music, art, dance and theater event planners
- Holiday and religious event planners
- Retreat event planners
- Funeral event planners

Cost Structure

- Marketing and sales
- R&D costs
- Infrastructure hosting
- Payment processing
- Payroll/contractors
- Legal/insurance
- Other OEMs (i.e. search engine, data privacy, scheduling, location services)

Revenue Streams

- Subscription model
- Advertising
- Booking fees
- Professional services (onboarding, in-house event planner, account manager)

Vendor Overview

Venues

- Restaurant
- Bar
- Nightclub
- Lounge
- Hotel
- Resort
- Brewery
- Winery
- Garden
- Fitness studio
- Gym
- Kitchen
- Warehouse
- Museum
- Aquarium
- Zoo
- Barn
- Golf course
- Mountain
- Place of worship
- Library
- Community center
- Convention center
- Art gallery
- Historical estate
- Retreat center
- Theater
- Concert hall
- Auditorium
- Arcade

Caterers

- Food caterers
- Liquor/ beverage
- Food stands & trucks
- Bakeries
- Cake decorators
- Charcuterie boards
- Dessert tables
- Seafood tables

Transportation

- Limousine
- Party bus
- Chauffeur
- Horse drawn carriage
- Valet

Decor

- Table decor
- Wall decor
- Hanging decor
- Balloons
- Decorative lights
- Ice sculptures
- Backdrops

Photo & Video

- Photographers
- Videographers
- Drone operators
- Photo booths

Rentals

- Tables and coverings
- Tableware
- Seating and coverings
- Rugs and carpets
- Tents
- Inflatables
- Mechanical bulls
- Dance floor
- Fitness equipment
- Food and kitchen equipment
- Lighting
- Audio
- Visual
- Virtual reality
- Headphones
- Fire pit
- Stages
- Costumes
- Portable toilets

Beauty

- Hair stylists
- Makeup artists
- Face painters
- Henna tattoo artists
- Temporary tattoos
- Massages
- Nail artists

Giveaways

- Custom merchandise
- Gift bags

Entertainment

- Musicians and bands
- Actors and theater groups
- Dancers and dance groups
- DJs
- Clowns
- Impersonators
- Comedians
- Magicians
- Hypnotists
- Psychics
- Public speakers
- Balloon artists
- Petting zoo
- Laser / light shows
- Pyrotechnicians
- Karaoke
- Airbrush artists
- Fine artists
- Games

Florals

- Centerpieces
- Bouquets
- Flower installations
- Small arrangements

Event Planners

- Boutique event planners
- In-house event planners

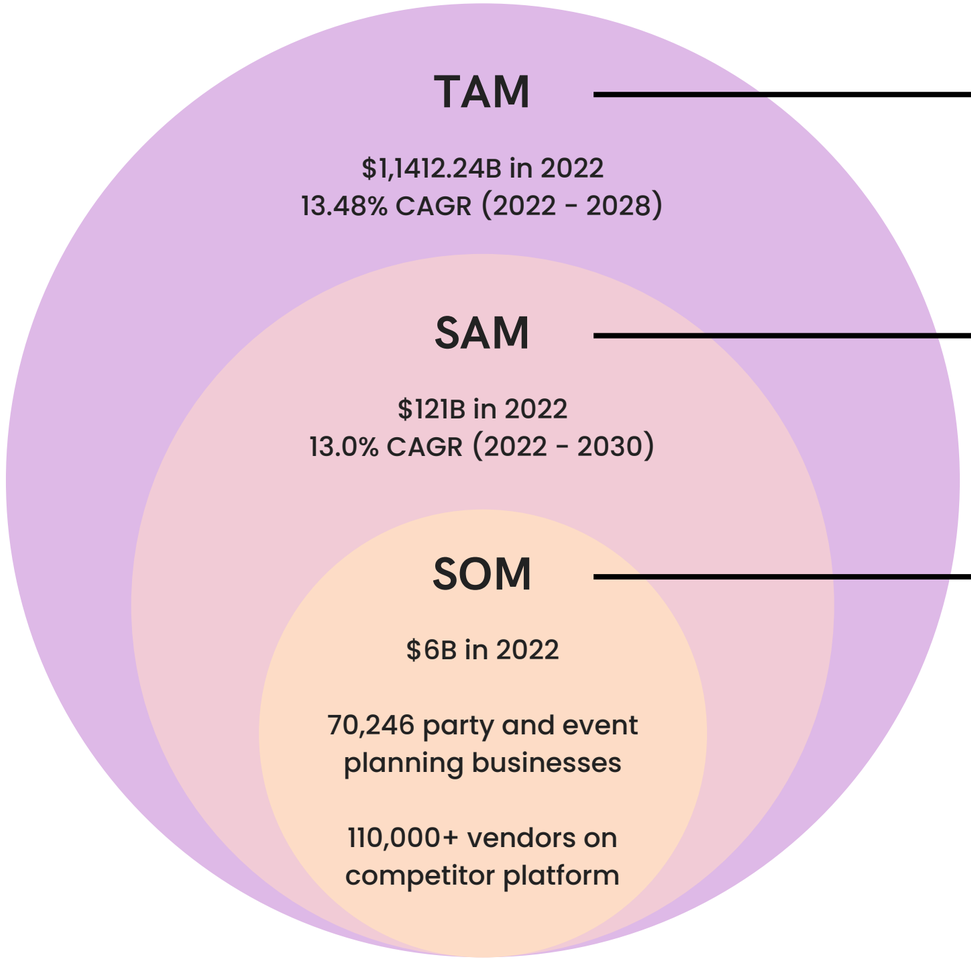
Design

- Print invitations
- Digital invitations
- Place cards
- Thank you cards
- Guest book
- Photo book
- Photo walls
- Posters
- Cutouts
- Event designers
- Signage
- Installations
- Seating chart
- Banners

On-Site Staff

- Bartenders
- Mixologists
- Servers
- Baristas
- Clean-up
- Security
- Day-of coordinator
- Dance instructors
- Fitness instructors
- Chefs
- Medical tent
- Sound technicians
- Lighting
- Officiant

Market Approach



Total Addressable Market

Global Events Industry Market size.

Service Addressable Market

US Events Market size.

Service Obtainable Market

US Party Supply Rental Industry Market size, number of party and event planning businesses in the US and number of vendors on a competitor platform.

Select areas include California, Florida and Texas.