



Client Service Packet



Company Overview

At Cayman & Co., I believe a great event is more than a beautiful space or a well-planned timeline. It's an experience that feels intentional, runs seamlessly, and allows you to be fully present for the moments that matter.

Whether you're planning a corporate gathering, nonprofit fundraiser, community event, celebration, or something entirely your own, my role is to make the process feel organized, manageable, and tailored to you.

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About Cayman & Co.



Tier 1: Consulting

You do not always need someone to take over the planning process. Sometimes, you simply need an experienced professional to help you organize your thoughts, answer your questions, and identify the best path forward.

The Consulting Session is designed for clients who are planning their own event but want professional insight before moving forward.

What is Included:

Pre-Consultation Review

Before our meeting, you will complete the service request form so I can better understand your event goals, expectations, and budget.

90 Minute Consultation Meeting

During our session, we will discuss important topics to create a clear vision of your event, including:

- Event concept and overall goals
- Budget considerations
- Venue suggestions
- Vendor needs
- Event timeline
- Guest experience and programming
- Décor and event design direction
- Logistics and potential challenges
- Planning priorities
- Your next steps

You'll Walk Away With

Following the session, you will receive a personalized action summary of:

- Key recommendations
- Priority action items
- Customized planning roadmap
- Suggested timeline with next steps

Who is This For?

First-time event planners
Small businesses and organizations
Nonprofits
DIY event planners
Clients who feel stuck
Clients who want a second opinion



Tier 2: Event Planning

You do not need to hand over your entire event to benefit from professional planning support.

This service is designed for clients who want to remain actively involved in their event while bringing in an experienced professional to assist with specific areas of the planning process.

What is Included:

Pre-Consultation Review

Before our meeting, you will complete the service request form so I can better understand your event goals, expectations, and budget.

Event Discovery and Planning Session

- Initial planning consultation to review goals and vision
- Scope-of-work development
- Identification of planning priorities
- Customized planning roadmap

Planning Organization

- Customized planning checklist
- Key milestone schedule
- Action-item tracking
- Planning deadline guidance
- Scheduled client check-ins

Professional Guidance

- Strategic recommendations throughout your contracted planning period
- Identification of potential planning gaps
- Problem-solving support within your selected scope
- Recommendations for creating an organized and cohesive event

Who is This For?

Corporate events

Nonprofit fundraisers

Galas

Awards events

Employee appreciation events

Conferences

Holiday parties

Clients who need help with specific planning responsibilities



Customizeable Event Inclusions:

Venue Research and Selection Support

- Research venues based on your criteria
- Create a shortlist of recommended options
- Compare capacity, amenities, and logistics
- Coordinate site visits
- Assist with venue questions and planning considerations

Vendor Research and Coordination

- Identify necessary vendors
- Research qualified vendor options
- Request availability and pricing information
- Compare proposals
- Coordinate meetings
- Track deadlines and required deliverables
- Serve as a planning point of contact within the agreed scope

Event Concept and Design

- Develop or refine the event concept
- Theme development
- Guest experience recommendations
- Inspiration or mood board
- Décor direction
- Floor plan and event flow recommendations
- Branded experience ideas

Program Development

- Agenda development
- Program flow
- Run-of-show recommendations
- Speaker coordination support
- Entertainment planning
- Awards or recognition logistics
- Transition planning

Guest Experience and Registration

- RSVP process recommendations
- Registration flow
- Guest communications timeline
- Seating guidance
- Name badge or check-in planning
- VIP experience recommendations
- Accessibility and guest-flow considerations

Corporate and Non-Profit Support

- Sponsor recognition planning
- Sponsor fulfillment tracking
- Donor/VIP experience planning
- Fundraising event logistics
- Auction coordination support
- Volunteer planning
- Stakeholder communication support
- Branded event experience

Tier 3: Day of Coordinating

You have put in the work. You have made the decisions. You have booked the vendors. Now, when your event finally arrives, you should not be the person checking the clock, answering vendor questions, directing setup, or solving unexpected problems.

My Day-of Coordinating service allows you to hand over the operational details so you can focus on your guests, team, and event experience.

What is Included:

Pre-Consultation Review

Before our meeting, you will complete the service request form so I can better understand your event goals, expectations, and budget.

Event Transition Meeting

- Initial planning consultation to review goals and vision
- Vendor information and key contacts
- Event schedule and program details
- Floor plan and setup requirements
- Client expectations for event-day management

Pre Event Prep

- Master Event Timeline creation
- Vendor confirmation and set up coordinating
- Venue logistics - including pre-event walkthrough
- Load-in and load-out schedule

Day of Management

- Arriving before key setup activities
- Vendor check-in and communication
- Setup oversight and timeline management
- Program cues and transitions
- Speaker and entertainment coordination
- Guest-flow management
- Troubleshooting and real-time problem-solving
- Breakdown oversight, if included

Who is This For?

Clients who have completed their own planning

Organizations with an internal planning team

Clients who want to enjoy their own event

Events with multiple vendors

Events with detailed programs or presentations

Fundraisers, galas, conferences, and corporate events



Tier 4: Full Service Planning and Coordinating

This is my most comprehensive service.

From the first planning conversation to the final breakdown, I work alongside you to create, organize, manage, and execute your event.

What is Included:

Pre-Consultation Review

Before our meeting, you will complete the service request form so I can better understand your event goals, expectations, and budget.

Event Discovery and Planning Session

- Initial planning consultation to review goals and vision
- Scope-of-work development
- Identification of planning priorities
- Customized planning roadmap

Planning Organization

- Customized planning checklist
- Key milestone schedule
- Action-item tracking
- Planning deadline guidance
- Scheduled client check-ins

PreEvent Prep

- Master Event Timeline creation
- Vendor confirmation and set up coordinating
- Venue logistics - including pre-event walkthrough
- Load-in and load-out schedule

Day of Management

- Arriving before key setup activities
- Vendor check-in and communication
- Setup oversight and timeline management
- Program cues and transitions
- Speaker and entertainment coordination
- Guest-flow management
- Troubleshooting and real-time problem-solving
- Breakdown oversight, if included

Who is This For?

- Have a complex event with many moving pieces
- Do not have the time to manage every planning detail
- Want professional guidance throughout the process
- Want a cohesive and intentional guest experience
- Want someone to manage the operational details on event day
- Want to attend and experience your event instead of working it

Use this table as a guide to quickly identify what services are offered in each tier.

Service	Tier 1 Consulting	Tier 2 Event Planning	Tier 3 Day-of Coordinating	Tier 4 Full Service
Customizable		✓	✓	✓
Strategy session	✓	✓	✓	✓
Ongoing planning		✓		✓
Budget support		✓		✓
Venue sourcing		✓		✓
Vendor sourcing		✓		✓
Vendor coordination		✓	✓	✓
Event design		✓		✓
Timeline/run of show		✓	✓	✓
Pre-event walkthrough			✓	✓
Event-day management			✓	✓
Post-event debrief		✓	✓	✓