

THE MODERN EVENT PLANNER'S GUIDE

# AI Tools That Save You Half Your Week

**3x**  
Less effort

**50%**  
Time saved per week

**9**  
Tasks covered

A practical guide to the 9 most time-consuming tasks in event planning  
No tech background needed. Just copy, paste, and get hours back.



# Why This Guide Exists

After talking to dozens of event planners, one thing kept coming up. Not a lack of skill or creativity but a lack of time. Vendor tables to build. Recaps to write. Bios to clean up. Budgets to reconcile. All of it done manually, all of it eating hours that could go toward the work only a human can do.

Most planners still use spreadsheets and handwritten notes. This guide changes that. Each section gives you a real prompt you can use today, a clear before-and-after comparison, and step-by-step instructions written in plain language.

AI tools like Claude, ChatGPT, and others can handle the first draft of almost everything on that list. This guide walks you through each task, shows you what the old way looked like, and gives you a ready-to-use prompt to get started right now.

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

## 01. PROCUREMENT

# Vendor Comparison Tables

 Under 10 minutes

Comparing 4 caterers or 3 AV companies used to mean opening multiple emails, copying numbers into a spreadsheet, and building columns by hand. AI does this in one step.

OLD WAY	WITH AI
Open each vendor proposal separately	Paste all proposal text into one prompt
Manually copy prices into a table	AI extracts, compares, and flags gaps
Build formatting from scratch	Table ready in under 5 minutes
Miss items buried in long PDFs	Ask follow-up questions instantly
Takes 2 to 3 hours	Easy to update if a vendor responds

## HOW TO DO IT

01

Copy the text from each vendor proposal or email. Paste all of them into one document or directly into the chat.

02

Use the prompt below. Replace the bracketed parts with your actual event details

03

AI will return a clean table. Ask it to highlight the best value option or flag anything missing from a proposal.

04

Export the table by copying into Google Sheets or asking AI to format it as a CSV.

Find us on social:



02

## SAMPLE PROMPT

Here are proposals from 3 catering vendors for a 200-person corporate dinner on October 12. Compare them in a table with these columns: vendor name, price per head, menu options, service staff included, setup and breakdown time, payment terms, and any exclusions. Then write a short paragraph recommending the best option based on value and completeness.

Pro tip: If a vendor did not include certain info, AI will flag it as 'not stated.' Use that as your follow-up checklist before signing anything.

Time saved: ~~2 to 3 hours~~ → 8 minutes

## 02. DAY-OF OPERATIONS

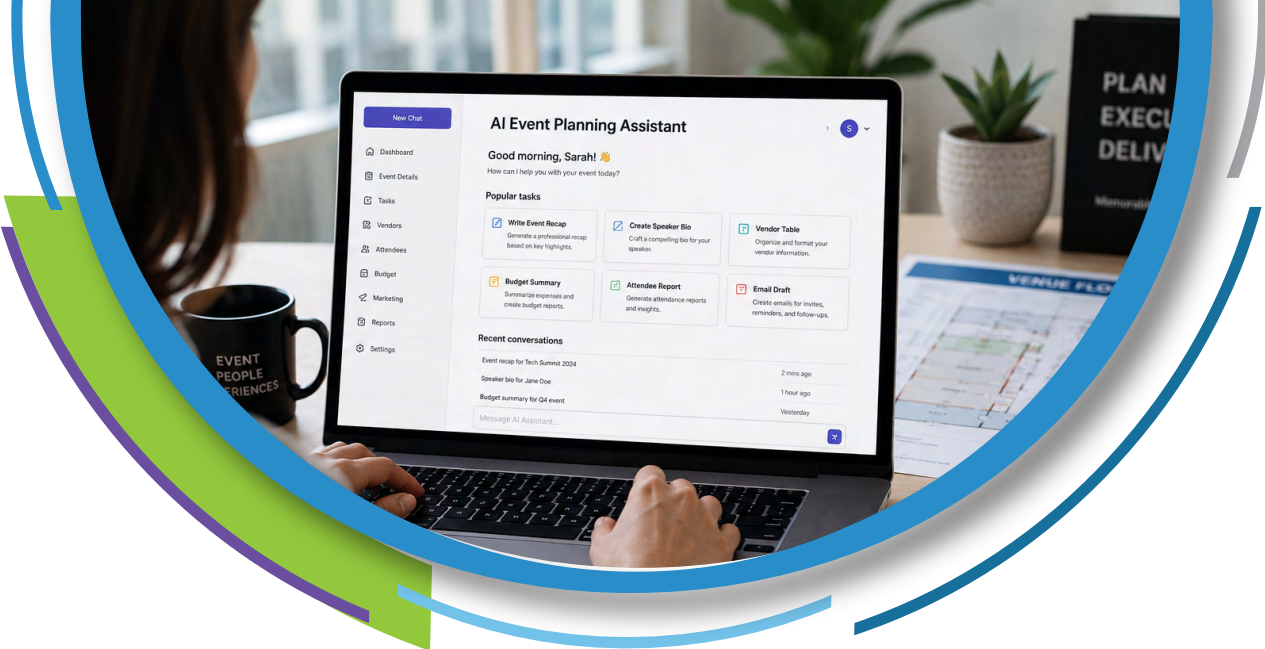
# First-Draft Run of Show

🕒 Under 10 minutes

Comparing 4 caterers or 3 AV companies used to mean opening multiple emails, copying numbers into a spreadsheet, and building columns by hand. AI does this in one step.

OLD WAY	WITH AI
Start from a blank template or last year's doc	Feed AI your agenda and key info
Build timing blocks one by one	Get a time-blocked draft with transitions
Easy to forget transitions and buffer time	Refine specific segments with follow-up prompts
Takes 2 to 4 hours for a full-day event	Done in under 15 minutes

Find us on social:



## HOW TO DO IT

01

List your event's key segments: registration, welcome, sessions, breaks, meals, networking, closing.

02

Note the start time, end time, venue location for each segment, and who is responsible.

03

Paste everything into the prompt below and let AI build the structure.

04

Review for gaps. Ask AI to add buffer time, AV checks, or speaker transition notes where needed.

### SAMPLE PROMPT

Create a detailed run of show for a full-day leadership conference for 150 people. The event runs from 8:00 AM to 6:00 PM at a hotel ballroom. Here are the segments: [paste your agenda]. Include columns for: time, duration, segment name, location, owner, AV/tech notes, and a notes column. Add 5-minute transition buffers between main sessions. Flag any timing risks.

Pro tip: Once you have the draft, ask AI: 'Where are the biggest timing risks in this schedule?' It will flag segments that are likely to run over.

Time saved: ~~3 to 4 hours~~ → 15 minutes

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

04

### 03 .SPEAKER MANAGEMENT

## Speaker Bio Cleanup

 Under 5 minutes

Speakers send their bios in every format: too long, too casual, written in third person, or copied from a LinkedIn profile from 2019. AI standardizes all of them in one pass.

OLD WAY	WITH AI
Rewrite each bio by hand	Paste all bios at once
Inconsistent tone across speakers	Set tone, length, and format in the prompt
Chase speakers to fix their own bios	All bios cleaned and matched in minutes
20 to 30 minutes per speaker	Easy to tweak by asking follow-ups

### HOW TO DO IT

01

Collect all raw speaker bios from email, LinkedIn, or speaker submissions.

02

Decide your format: word count, perspective (third person), and tone.

03

Paste all bios into a single prompt with your requirements.

04

Review and send back to speakers for approval if needed.

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)



## SAMPLE PROMPT

Create a detailed run of show for a full-day leadership conference for 150 people. The event runs from 8:00 AM to 6:00 PM at a hotel ballroom. Here are the segments: [paste your agenda]. Include columns for: time, duration, segment name, location, owner, AV/tech notes, and a notes column. Add 5-minute transition buffers between main sessions. Flag any timing risks.

Pro tip: Add a line like 'Make them all feel like they belong in the same program' and AI will match the tone across all bios automatically.

Time saved: ~~30 min per speaker~~ → 5 min for all of them

Find us on social:



## 04. REGISTRATION

# Attendee List Reconciliation

 Under 10 minutes

You have a registration export, a hotel room block list, and a dietary requirements sheet. They never match. AI can reconcile all three and flag the problems without you touching a formula.

OLD WAY	WITH AI
Use VLOOKUP across multiple sheets	Paste all lists into one prompt
Manually check name spelling differences	AI matches names even with spelling differences
Cross-reference dietary notes by hand	Flags duplicates, missing entries, conflicts
Half a day for 200-person events	Returns a clean master list

### HOW TO DO IT

01

Export your lists from the registration platform, hotel, and dietary form as plain text or CSV.

02

Paste all three into one message with a clear label for each list.

03

Use the prompt below to ask for a reconciled master list.

04

For very large lists, use file upload features in Claude or ChatGPT instead of pasting.

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

08

## SAMPLE PROMPT

I have three attendee lists for the same event that need to be reconciled. List 1 is from our registration platform. List 2 is from the hotel room block. List 3 has dietary restrictions submitted via a separate form. Please: (1) Match attendees across all three lists by name, (2) Flag anyone who registered but has no room booked if they selected hotel accommodation, (3) Flag anyone with a dietary note who does not appear on the main registration list, (4) Note any name discrepancies that might be the same person. Return a master table.

Pro tip: For very large lists, use a dedicated data tool like Google Sheets with the Gemini AI add-on, or upload CSVs directly to Claude or ChatGPT as file attachments.

Time saved: ~~4 to 5 hours~~ → 10 minutes

## 05 . FINANCE

# Budget Variance Summaries

 Under 10 minutes

After an event, someone needs to explain why the AV came in 12% over budget and the catering was under. Writing that summary used to take hours of pulling numbers and writing narrative. AI does both.

OLD WAY	WITH AI
Build variance calculations in Excel	Paste budget vs actual numbers
Write narrative explanations separately	AI calculates variances and writes the narrative
Format for finance team or client	Flags biggest line item swings automatically
Easy to miss line items	Ready to share with stakeholders

Find us on social:

## HOW TO DO IT

01

Pull your final actuals from invoices or expense tracking.

02

List each budget category with the budgeted amount and actual spend.

03

Add any context notes for why specific lines changed.

04

Use the prompt below to generate a full variance summary.

### SAMPLE PROMPT

Here is the budget vs actual for our annual sales kickoff event. Create a budget variance summary that: (1) Shows each category with budgeted amount, actual amount, variance in dollars, and variance as a percentage, (2) Highlights any category more than 10% over or under budget, (3) Writes a 2 to 3 sentence explanation for each major variance based on the notes I provide, (4) Ends with a total event variance and an overall summary paragraph suitable for sharing with the client. [Paste your budget vs actual data] [Add any notes on why specific items changed]

Pro tip: Add context notes like 'AV overage was due to a last-minute livestream request from the client' and AI will weave those into the narrative so it reads like you wrote it yourself.


Time saved: ~~2 to 3 hours~~ → 10 minutes

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

# BEO Drafts for Hotel Review

 Under 15 minutes

A Banquet Event Order is the contract between you and the venue's operations team. It needs to be precise and complete. AI can draft one from your notes before you ever sit down with the catering manager.

OLD WAY	WITH AI
Fill out hotel templates field by field	Share your event notes and requirements
Easy to leave sections blank	AI produces a complete BEO draft
Multiple back-and-forth revisions with venue	Flags common missing fields automatically
2 to 3 hours per BEO	Fewer revision cycles with the venue

## HOW TO DO IT

- 01** Gather your event details: date, times, room name, guest count, setup style, F&B requirements, and AV needs.
- 02** Include any special requirements: dietary accommodations, accessibility needs, signage requests.
- 03** Use the prompt below to generate a full BEO draft.
- 04** Send to the venue as a starting point and note any fields still to be confirmed.

Find us on social:

## SAMPLE PROMPT


Draft a Banquet Event Order for a hotel to review. Event details: [name, date, times, guest count, room name]. Room setup: [theater, rounds, classroom, etc.]. Food and beverage: [breakfast, lunch, breaks, dinner details]. AV requirements: [screen, projector, microphones, etc.]. Special requirements: [dietary, accessibility, signage, etc.]. Format it as a formal BEO document with sections for event summary, room setup, F&B schedule, AV, staffing notes, and a notes section. Flag any field where I need to confirm a detail with the venue.

Pro tip: After generating the BEO, ask AI: 'What questions should I ask the venue before signing off on this?' It will produce a ready-made checklist for your pre-event site visit.

Time saved: ~~2 to 3 hours~~ → 15 minutes

## 07. POST-EVENT

# Post-Event Recap Copy

 Under 10 minutes

After an event you are exhausted but the recap report is due. Clients want metrics, highlights, and lessons learned. AI turns your rough notes into a polished summary before you have even had coffee

### OLD WAY

### WITH AI

Write from scratch while post-event tired	Drop in raw notes, stats, and feedback
Struggle to make bullet points into narrative	AI builds a clean narrative recap
Hard to strike the right tone for the client	Adjust tone for internal vs client use
Takes 2 to 4 hours	Done before you leave the venue

Find us on social:

  [www.fielddrive.com](http://www.fielddrive.com)

## HOW TO DO IT

01

Collect your raw notes, attendance numbers, survey results, and any standout moments.

02

Note the audience for this recap: client, internal team, or executive summary.

03

Use the prompt below, pasting in all your raw material.

04

Ask AI to adjust the length or tone if needed for different audiences.

### SAMPLE PROMPT

TDraft a Banquet Event Order for a hotel to review. Event details: [name, date, times, guest count, room name]. Room setup: [theater, rounds, classroom, etc.]. Food and beverage: [breakfast, lunch, breaks, dinner details]. AV requirements: [screen, projector, microphones, etc.]. Special requirements: [dietary, accessibility, signage, etc.]. Format it as a formal BEO document with sections for event summary, room setup, F&B schedule, AV, staffing notes, and a notes section. Flag any field where I need to confirm a detail with the venue.

Pro tip: Include any direct quotes from attendee surveys. AI will weave them into the recap naturally as social proof, which clients love seeing.

Time saved: ~~3 to 4 hours~~ → 10 minutes

---

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

10

# Sponsorship Deck Object

 Under 10 minutes

A sponsor pushes back on pricing or ROI. You need a confident, data-informed response. AI can prepare you for every common objection before the conversation even starts.

OLD WAY	WITH AI
Think through objections from memory	Drop in raw notes, stats, and feedback
Struggle to make bullet points into narrative	AI builds a clean narrative recap
Hard to strike the right tone for the client	Adjust tone for internal vs client use
Takes 2 to 4 hours	Done before you leave the venue

## HOW TO DO IT

- 01 Collect your raw notes, attendance numbers, survey results, and any standout moments.
- 02 Note the audience for this recap: client, internal team, or executive summary.
- 03 Use the prompt below, pasting in all your raw material.
- 04 Ask AI to adjust the length or tone if needed for different audiences.

Find us on social:

## SAMPLE PROMPT


TDraft a Banquet Event Order for a hotel to review. Event details: [name, date, times, guest count, room name]. Room setup: [theater, rounds, classroom, etc.]. Food and beverage: [breakfast, lunch, breaks, dinner details]. AV requirements: [screen, projector, microphones, etc.]. Special requirements: [dietary, accessibility, signage, etc.]. Format it as a formal BEO document with sections for event summary, room setup, F&B schedule, AV, staffing notes, and a notes section. Flag any field where I need to confirm a detail with the venue.

Pro tip: Include any direct quotes from attendee surveys. AI will weave them into the recap naturally as social proof, which clients love seeing.

Time saved: ~~3 to 4 hours~~ → 10 minutes

## 09 / REPORTING

# Custom Dashboards

 Under 15 minutes

Clients and internal stakeholders want a single view of event performance. Building dashboards used to require knowing how to code or paying a designer. AI can write the code for a working dashboard in minutes.

OLD WAY	WITH AI
Pay a designer or developer	Describe what you need in plain language
Build charts in Excel with limited flexibility	AI writes working code for a web dashboard
Days to weeks of back-and-forth	Update it instantly by changing the data
Hard to update when numbers change	No design or coding skills required

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

## HOW TO DO IT

01

List the metrics you want to display: registrations, revenue, satisfaction scores, session attendance, etc.

02

Decide who will see it and at what level of detail.

03

Ask AI to build an HTML dashboard file you can open in any browser.

04

For Google Sheets users, ask AI to write Google Apps Script code to auto-generate charts from your data tab.

### SAMPLE PROMPT

Build me a simple event performance dashboard as an HTML file I can open in a browser. It should show the following metrics for our annual conference: total registrations vs target, day-of attendance rate, net promoter score, top 5 sessions by attendance, revenue vs budget, and sponsor count. Use a clean professional design with a dark header. Here is my data: [Paste your numbers here]

Pro tip: Tools like Notion AI, Airtable AI, and Google Looker Studio also have built-in AI features that can auto-generate dashboards directly from your existing event data without any code

Time saved: ~~Days of back-and-forth~~ → 15 minutes

---

Find us on social:



[www.fielddrive.com](http://www.fielddrive.com)

02



## What AI Cannot Replace

The goal is not to hand your job to a machine. It is to free up your energy for what actually makes events great. The parts that require a human to be present, thoughtful, and real.

✔ Energy    ✔ Taste    ✔ Judgment    ✔ Hospitality    ✔ Relationships

The planners who build real leverage with AI will have more room to focus on these. That is the whole point.

For more helpful guides and tips, check out [fielddrive Academy](#)  
our in-depth resource repository for all things events!



SCAN THE QR CODE

[www.fielddrive.com](http://www.fielddrive.com)

✉ [marketing@fielddrive.com](mailto:marketing@fielddrive.com) ☎ +32 3 860 16 90