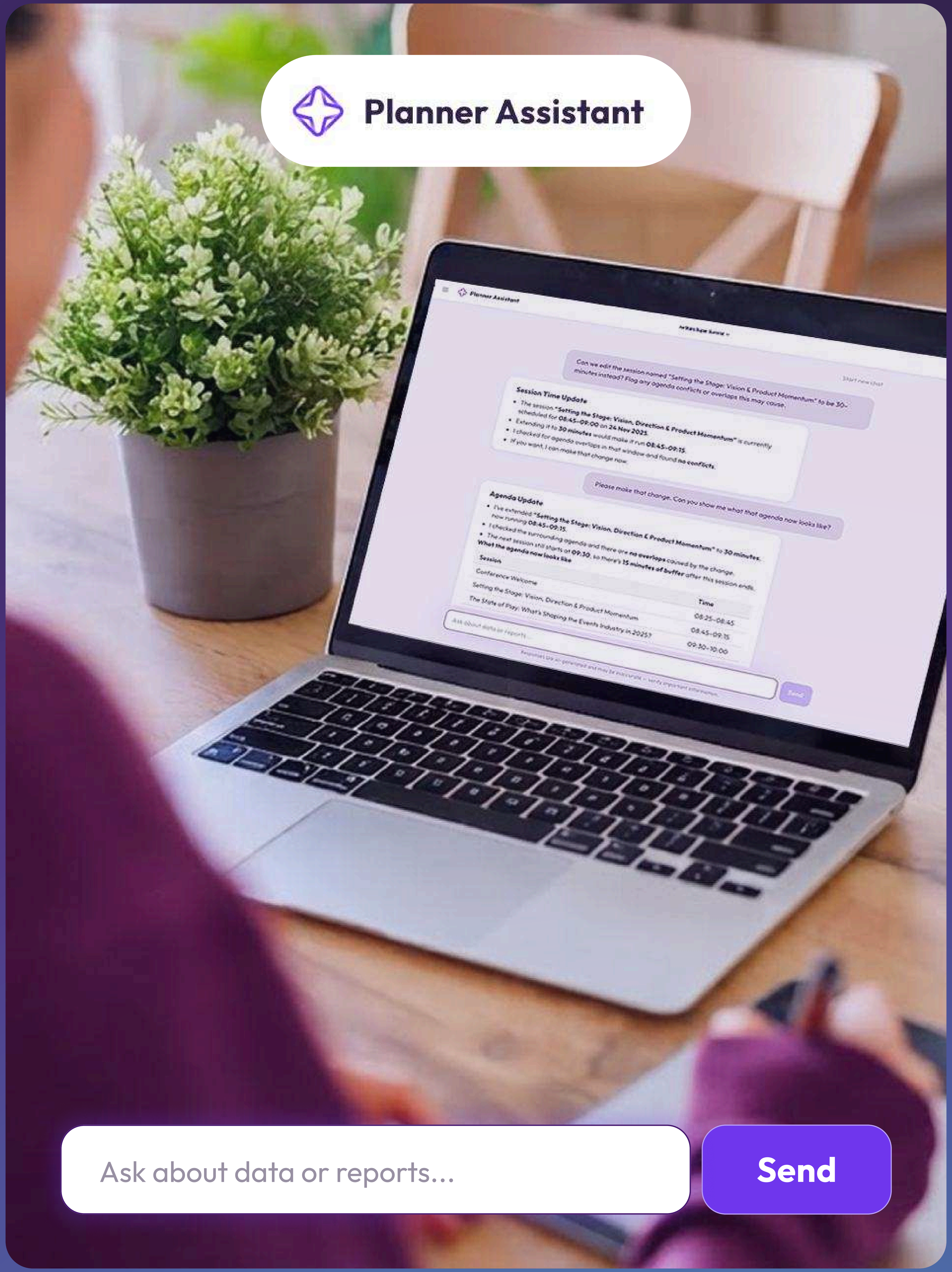
eventsair

The AI Prompt Playbook for Event Planners

A working guide to getting real work done with Planner Assistant, built natively into EventsAir.

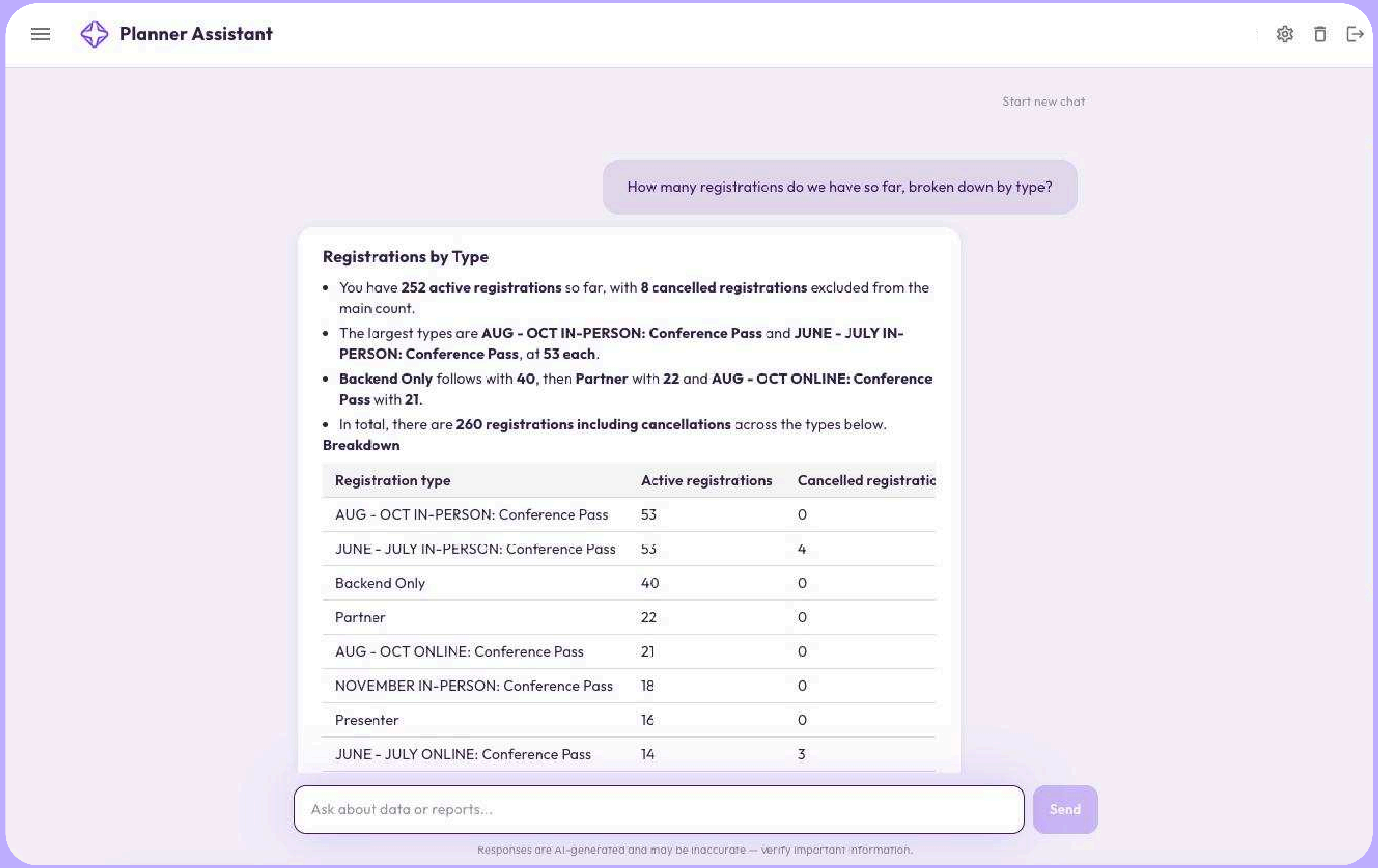


Meet Planner Assistant

Planner Assistant transforms the way you interact with your events. Working from your live and historical event data in EventsAir, it lets you ask complex questions, uncover opportunities, predict outcomes, and act with clarity, without digging through reports or dashboards. It's built natively into EventsAir, so it's simply there from the moment you log in, working from the same data as the rest of your event.

Ask it something like “Show me total revenue collected so far, broken down by registration type and payment status,” and you get an instant visual answer instead of a report to build.

Or ask it “Which sessions are trending toward overcapacity?” and Planner Assistant can go a step further, taking action on your behalf, such as moving a session to a larger hall on request, in the same conversation.

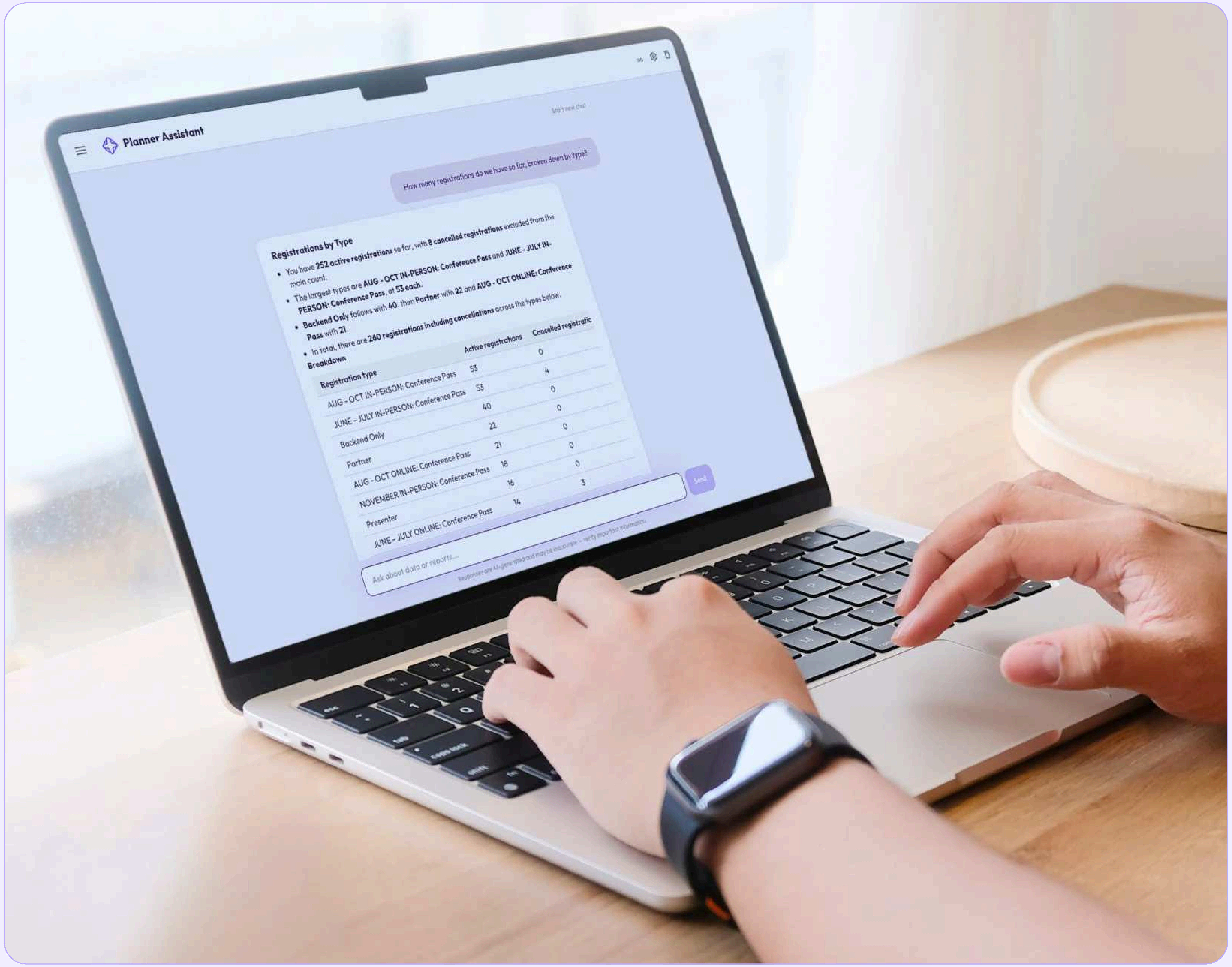


About this playbook

This playbook is a working set of prompts built around real use cases. Think of them less as scripts to copy word for word, and more as a way to get your thinking started.

Planner Assistant understands plain language, so you don't need to match this wording exactly for it to work.

What matters more is getting a feel for the kinds of questions worth asking, and where the biggest opportunities sit for AI to do the digging on your behalf.



Our top three rules for querying event data with AI

Every prompt in this playbook is built on the same foundation, and none of these rules are specific to Planner Assistant. They apply any time you're asking an AI tool to work with your event data, whether that's Planner Assistant natively inside EventsAir or another AI you've connected to your data through something like an MCP server.

Good prompting habits are good prompting habits regardless of the tool behind them. Learn them once, and you'll start to notice them at work throughout the prompts below.

1. Name the field type when you filter

You think in planner language: coordinators, VIPs, delegates, sponsors. The system underneath is thinking in field names and object types: registration type, category, tag. Bridging that gap in the prompt itself is what gets you a sharp filter instead of a fuzzy match.

If you're not sure what something is actually called in your data, that's worth asking directly rather than guessing. Treat it as a two-way conversation: ask Planner Assistant how a category is structured before you build a question around it, and you'll get a cleaner answer the first time.

Instead of: "Give me a list of all group coordinators with their dietary requirements."

Try: "Give me a list of all Group Coordinator attendees with their dietary requirements. Group Coordinator is a registration type."

2. Anchor time-bound questions to what you can still act on

This matters most during a live event, but it applies to any question with a deadline attached: a registration cutoff, a payment due date, a speaker submission window. An unanchored question gets you an analysis of everything so far, including things that have already happened and can't be changed. Anchoring to a specific point in time, and to what's still within your control, is what turns a general summary into something you can actually act on before the window closes.

Instead of: "What is the survey feedback saying?"

Try: "Day 2 starts in 12 hours. Analyze only the survey responses received today and give me three things I can still act on before tomorrow morning."

3. Chain events to compare across years

Most AI tools that work with event data work inside one event at a time. If you ask an open-ended "how does this compare to last year," you'll get a partial answer. Walk it through the comparison instead, naming both events explicitly rather than assuming it will infer which two you mean. The more specific you've been about what you actually want, the sharper each half of that comparison turns out.

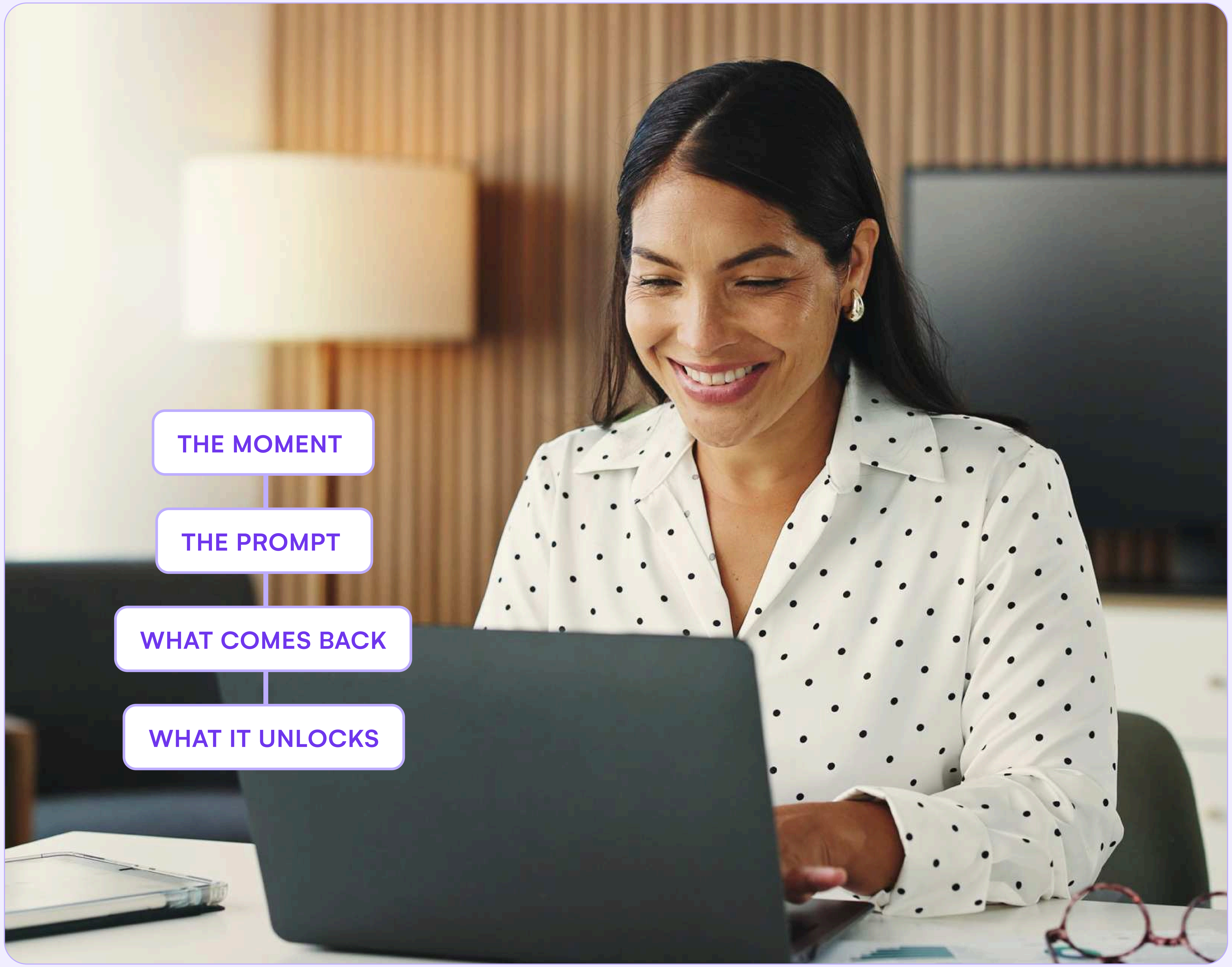
Instead of: "How has attendance trended year on year?"

Try: "Run a full registration statistics report across Annual Congress 2025. Then switch to Annual Congress 2026 and pull the exact same set of data. Compare the two and tell me what's changed."

How the prompts are structured

The prompts in this playbook are organized the way you actually move through an event: from first planning conversations through to the post-event wrap. Each one follows the same pattern:

- **The moment:** the situation you're actually in when you'd reach for this
- **The prompt:** copy it, adjust anything in brackets
- **What comes back:** grounded in real tested output
- **What it unlocks:** where the answer actually points you next



1. Compare this year to last

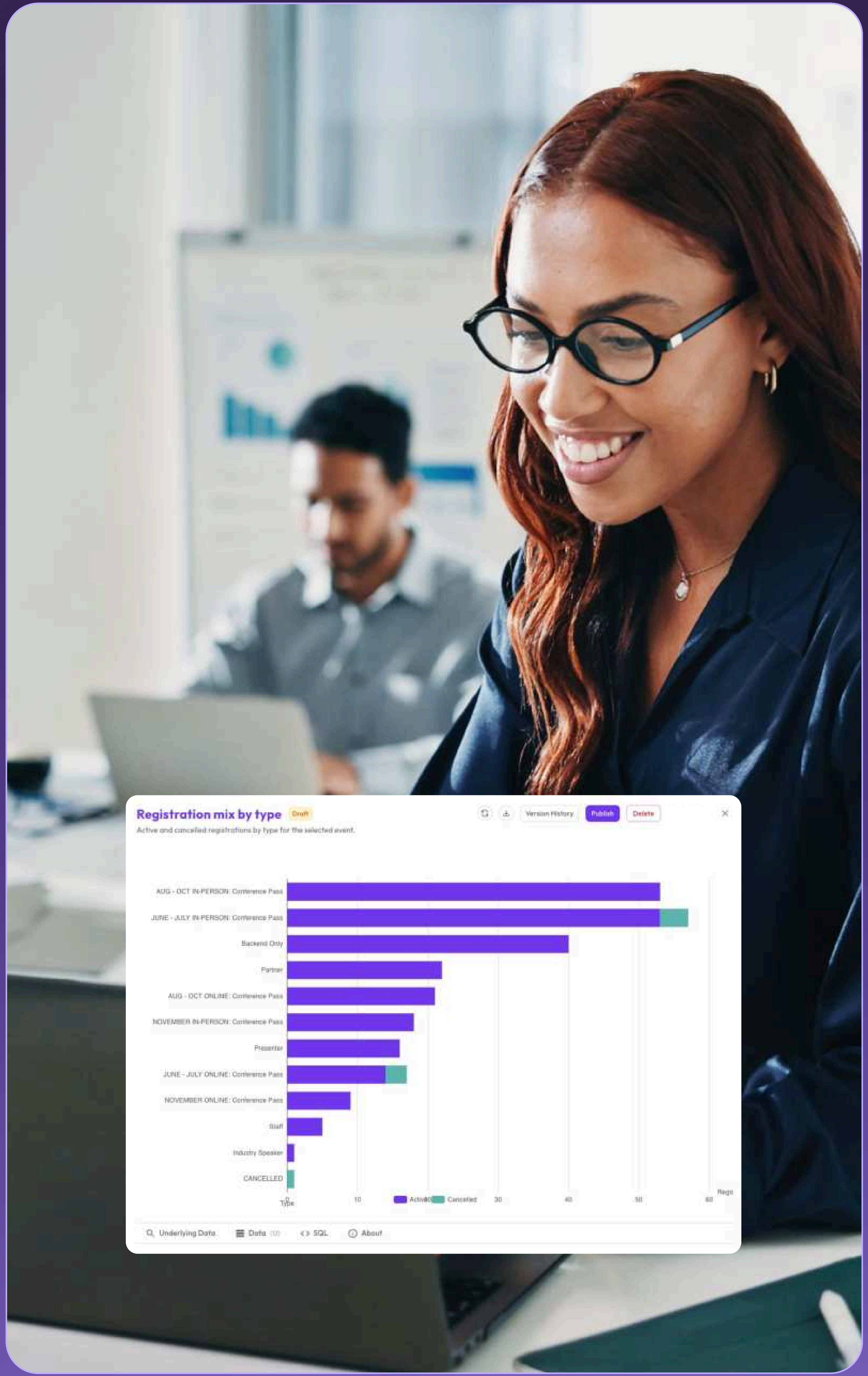
The moment: You're two months out, building your plan, and someone on the leadership team asks how this year is tracking against last. Pulling that together manually means multiple exports and an afternoon reconciling them by hand.

The prompt:

> "Run a full registration statistics report across <last year's event>. Then switch to <this year's event> and pull the exact same set of data. Compare the two and tell me what's changed."

What comes back: Side-by-side registration, financial, and function figures for both events, with the notable shifts called out.

What it unlocks: This is the chaining technique in action: asking it to switch events explicitly rather than assuming it will infer the comparison. Once you've seen the shifts, the next natural question is why. Is a registration type trailing, is a function underselling, is revenue pacing ahead or behind. That's your cue to dig into the Event Management prompts below.



2. Replicate what worked last time

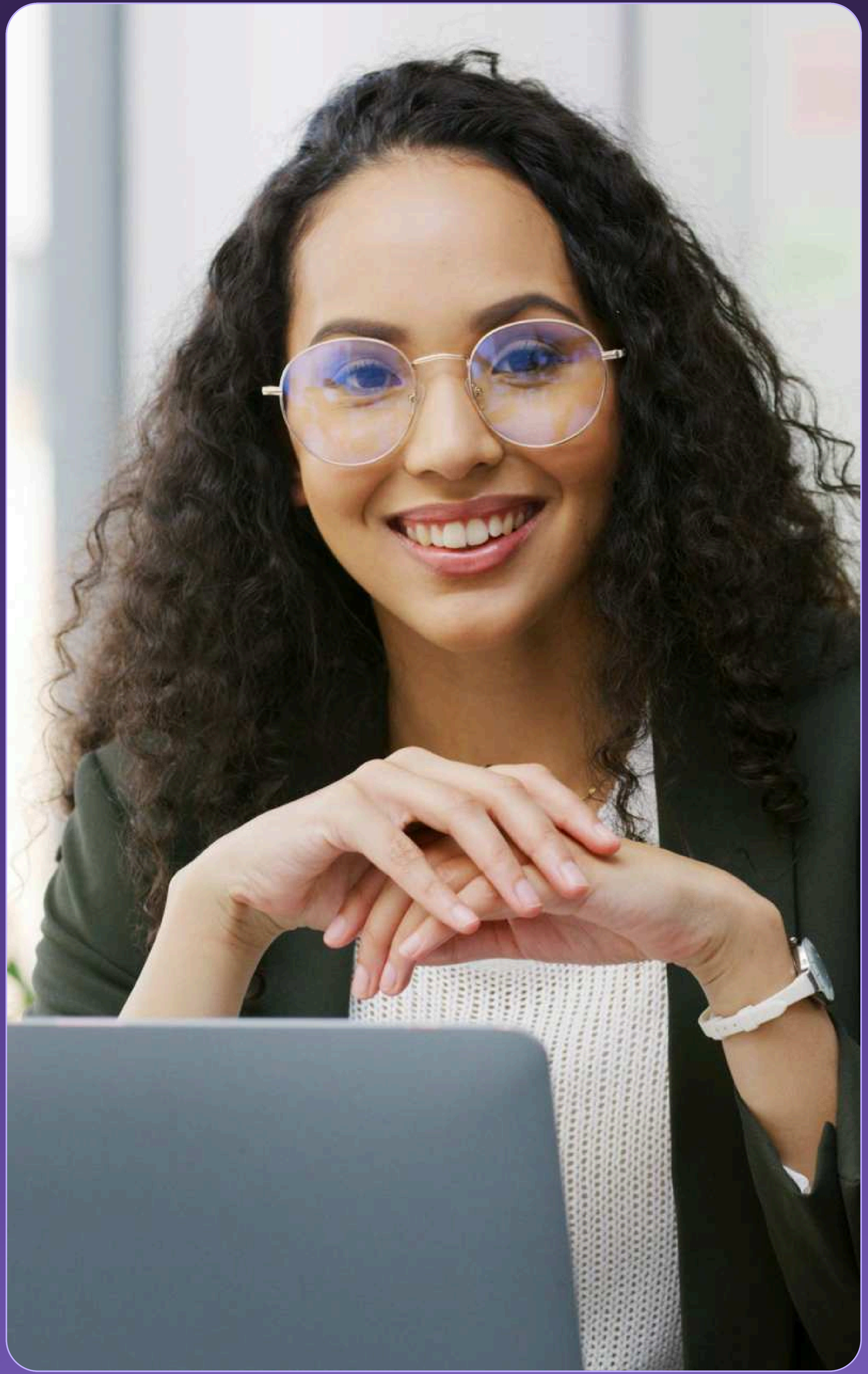
The moment: A previous event had a setup you liked: the registration types, the agenda shape, the catering options. Re-creating that from memory (or re-creating it at all if you didn't originally build it) means digging back through an entire build.

The prompt:

> “Show me how <previous event> was configured, including registration types, agenda and catering setup, so I can replicate it.”

What comes back: A configuration snapshot of the prior event across registration, agenda, and catering.

What it unlocks: Once you have the snapshot, use it as a checklist rather than a copy job. If this past event fits a similar structure to what you're looking to build, clone it. But there's another opportunity here too: ask a follow-up like "Is there anything in this set-up that you believe could be improved?" That paves the way to continuous improvement, not just repetition.



3. Chase down missing speaker materials

The moment: You're finalizing the run of show and need to know exactly what's still missing from a given speaker, whether that's slides, a headshot, a bio, or anything else you're tracking, without scrolling through every individual speaker record to check.

The prompt:

> "Which speakers haven't submitted their slides yet? Include their name, email, and organization."

What comes back: A list of presenters with missing materials, along with their contact details, so you're not looking anyone up a second time.

What it unlocks: With names and emails already attached, the useful next step is a targeted nudge rather than a blanket reminder to every speaker. Try "Draft a short reminder email to just the speakers on this list." You're only chasing the people who actually need chasing, and you've already got what you need to do it.

4. Build your agenda by talking to it

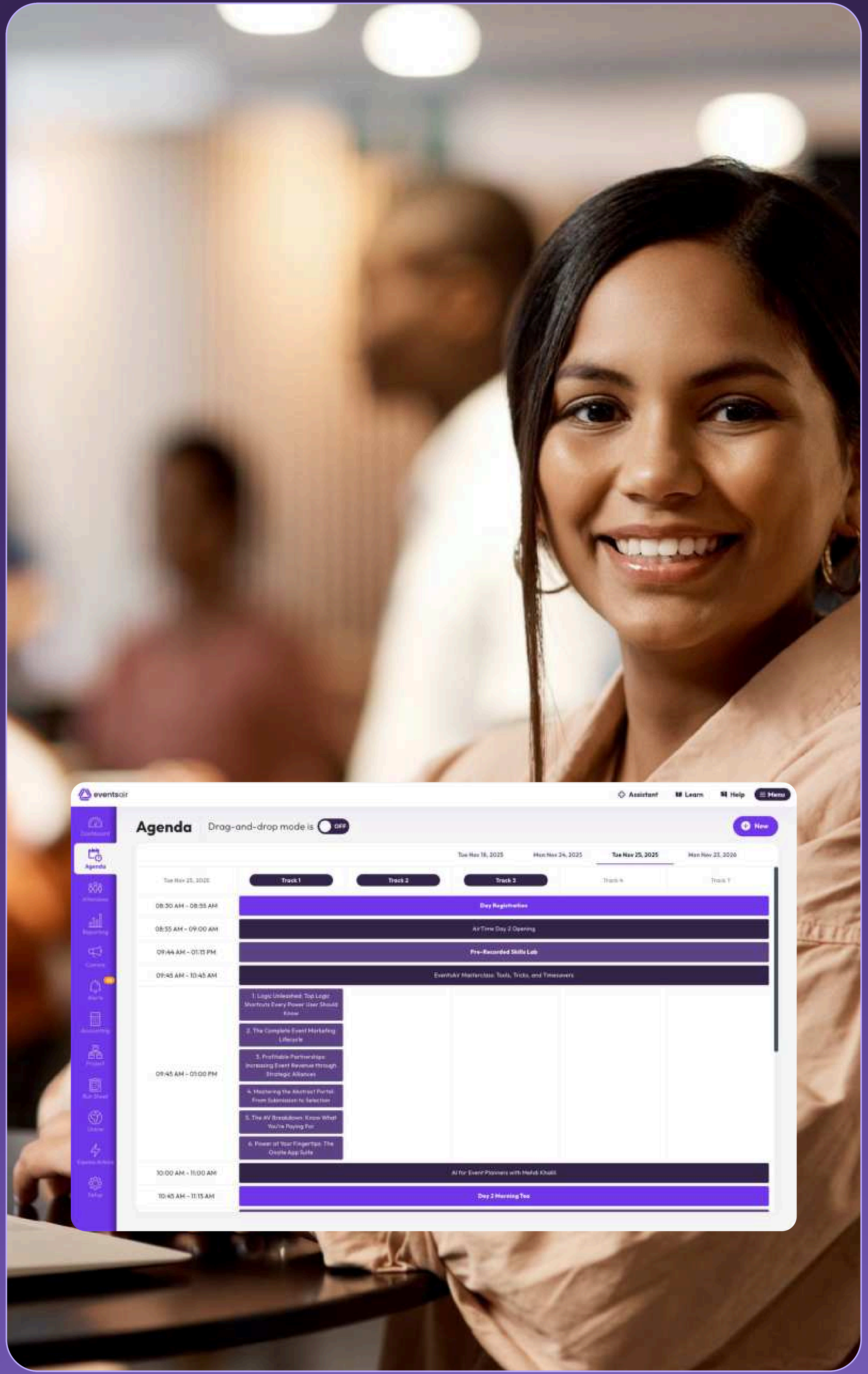
The moment: You're shaping the day-of schedule and need to make a small change. Once an agenda spans multiple days and multiple rooms, even a small adjustment (a break added, a session shifted ten minutes) can mean re-checking every dependent time slot by hand.

The prompt:

> “Extend the networking break by 15 minutes." Or “Change the keynote session on 19 Aug to start at 9:00 and run for 1 hour.” And for a final check “Are any of my current sessions overlapping?”

What comes back: Planner Assistant shows you the proposed change. You confirm. It writes the change into EventsAir. The same pattern works just as well for moving something that already exists, such as asking it to shift the afternoon tea break to 3:15 instead.

What it unlocks: The confirmation step matters here: nothing changes in EventsAir until you say yes, so you can move through small agenda tweaks quickly without worrying about an accidental edit. Once you're comfortable with the pattern, it's worth using it for the other small day-of adjustments that come up, rather than reaching for the agenda builder out of habit.



5. Know where your registrations stand, by type

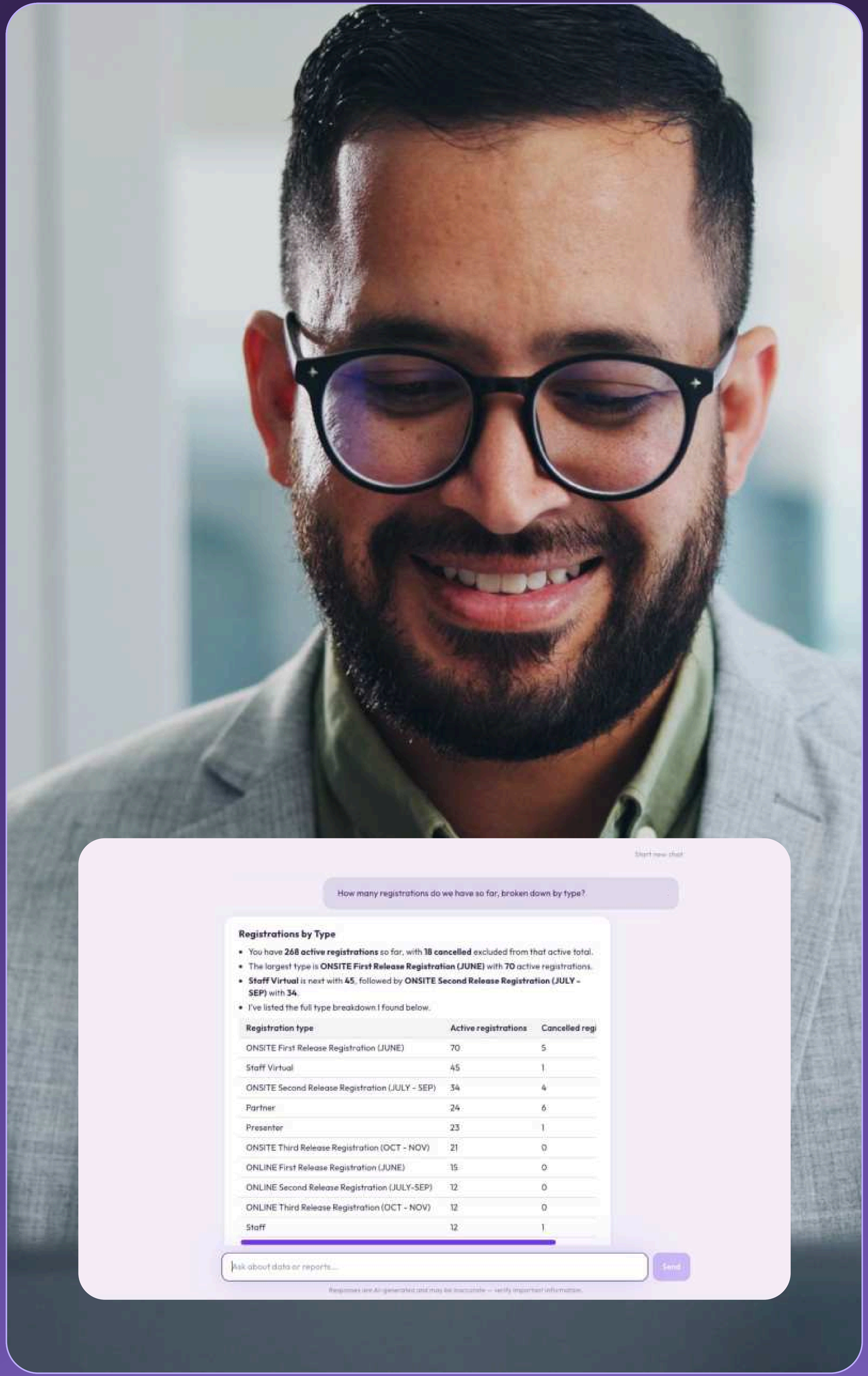
The moment: You're mid-campaign, and before deciding whether to push harder on any particular audience, you want a pulse check on where numbers actually sit right now.

The prompt:

> "How many registrations do we have so far, broken down by type?"

What comes back: Total registrations with a count per registration type.

What it unlocks: This is the prompt that turns a status check into a decision. If your Member registrations are pacing well but Non-Member is trailing against where it usually sits by this point, that's not a "send a general reminder" problem. It's a segment-specific push. A targeted email to the audience that's actually behind does more than a blanket nudge to everyone, and this is the prompt that tells you which audience that is.



6. Track ticket sales for a specific function

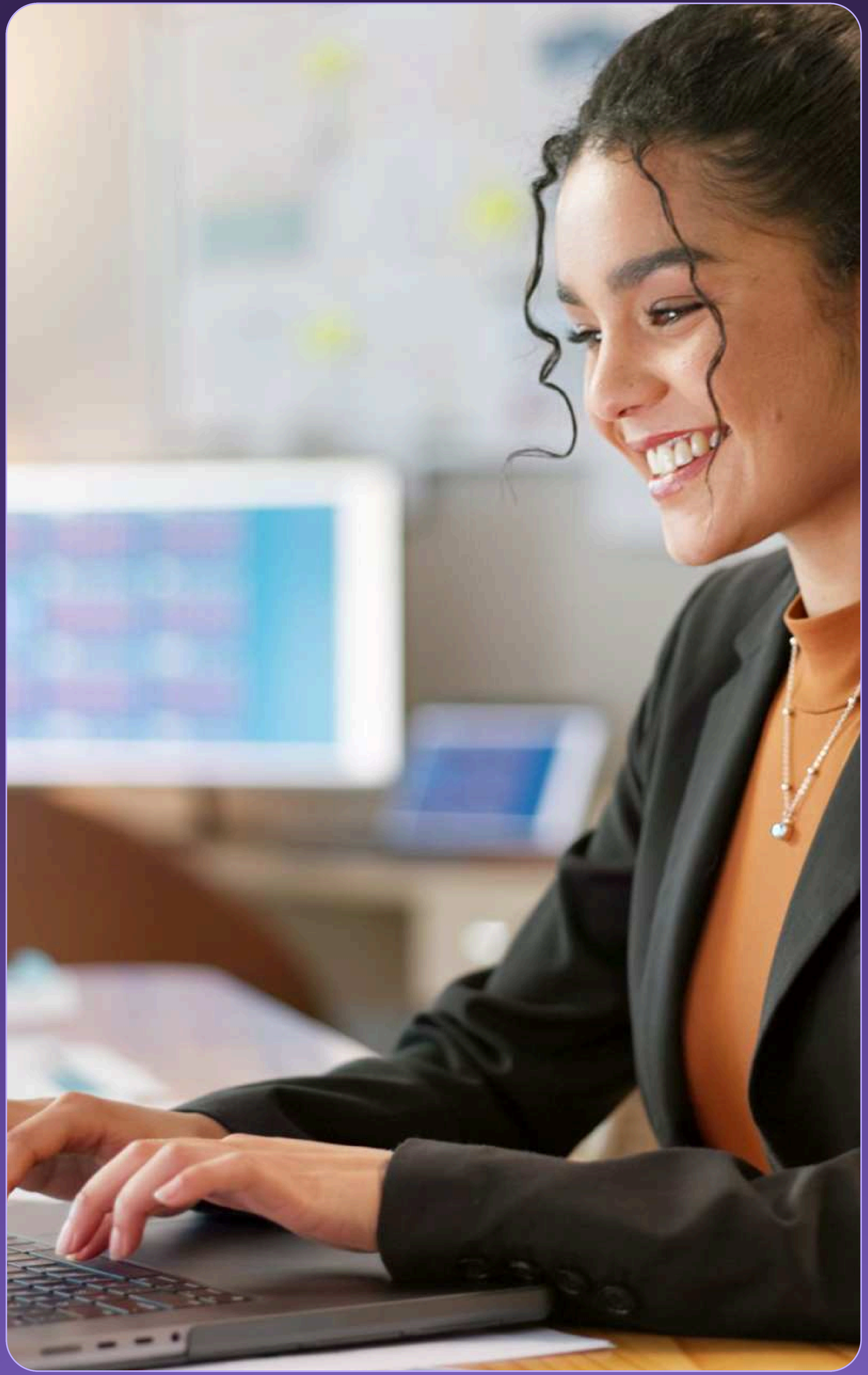
The moment: You want more than a raw count on a single function. You want to know exactly who's still sitting on the table, so you can do something about it before the cutoff.

The prompt:

> “How many tickets have been sold for the <specific function e.g. gala dinner>, and which registered delegates haven't purchased one yet?”

What comes back: A ticket count for the named function, plus a list of registered attendees who haven't added it to their registration.

What it unlocks: That gap list is a targeted upsell opportunity, not just a number. Ask a follow-up like "Draft a short reminder to the delegates on this list letting them know tickets are still available." You're not guessing who to target. You already know exactly who hasn't converted.



7. Check ticket sales across all social functions at once

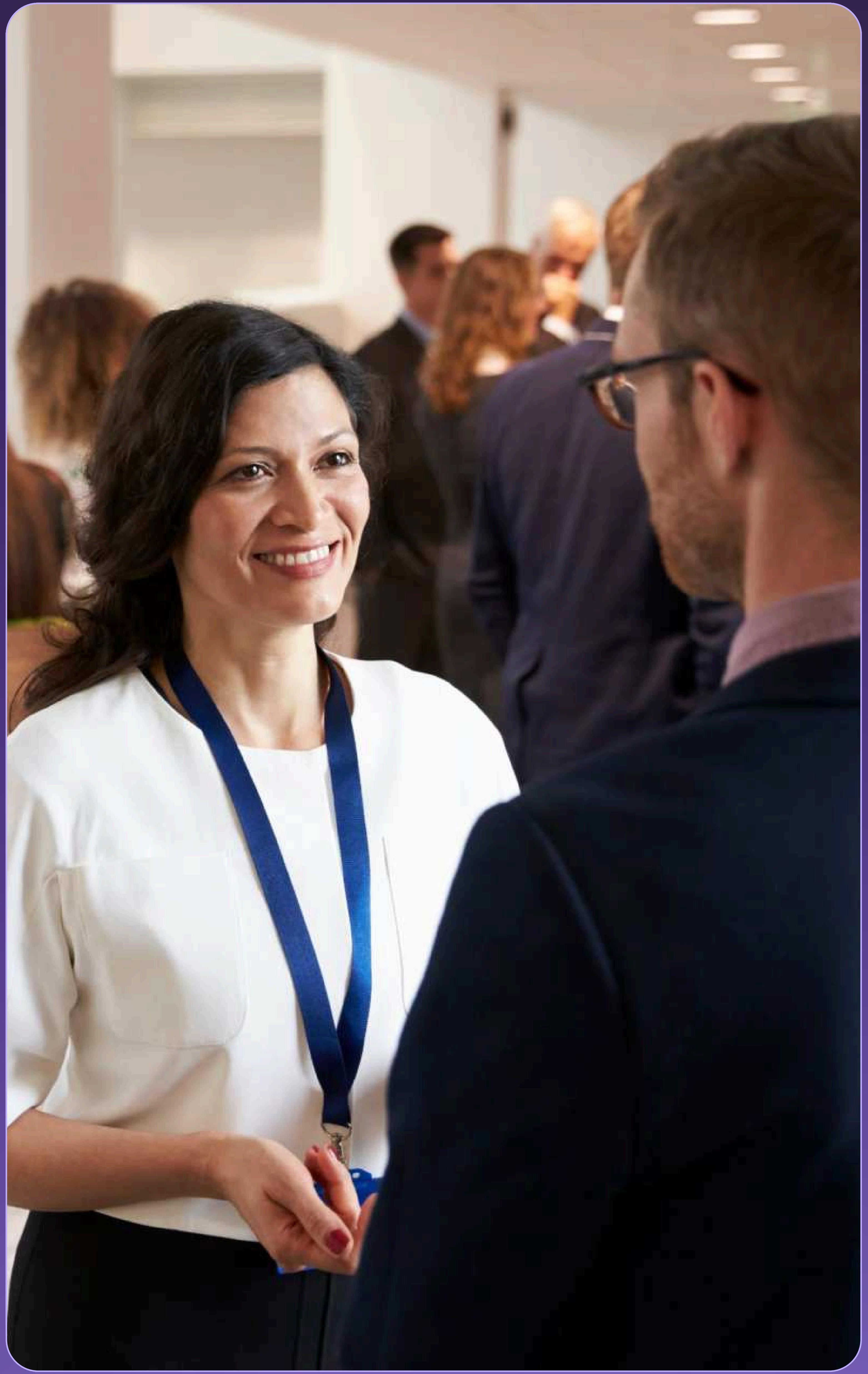
The moment: You want a single sweep of every social event on the program without pulling each one up individually, and without internal admin sessions or logistics items muddying the count.

The prompt:

> “How many tickets have been sold across all social functions? Break this down by function.”

What comes back: Ticket counts per social function, correctly excluding non-social items sitting in the same module.

What it unlocks: If one function is clearly lagging the others, don't stop at the number. Ask "Do you have any recommendations for increasing bookings for <the function>?" That turns a status check into a plan, rather than something you have to figure out on your own from a list of counts.



8. Pull dietary and accessibility needs for a specific group

The moment: Catering or the venue needs a filtered list quickly: not a manual read-through of every attendee's individual notes, and not everyone's requirements, just one group's.

The prompt:

> "Give me a list of all VIP attendees with their dietary requirements and accessibility needs. VIP is a registration type."

What comes back: An attendee list filtered by registration type, with dietary and accessibility data attached. Naming the field type (VIP is a registration type, not a description) is what gets you the clean filter.

What it unlocks: Once you've got the breakdown for one group, run the same question at the whole-event level: "Now show me the same breakdown across every registered attendee, not just this group." That's the number catering actually needs to plan quantities, and it's one follow-up away from the group-level list you started with.

9. Spot your most engaged organizations

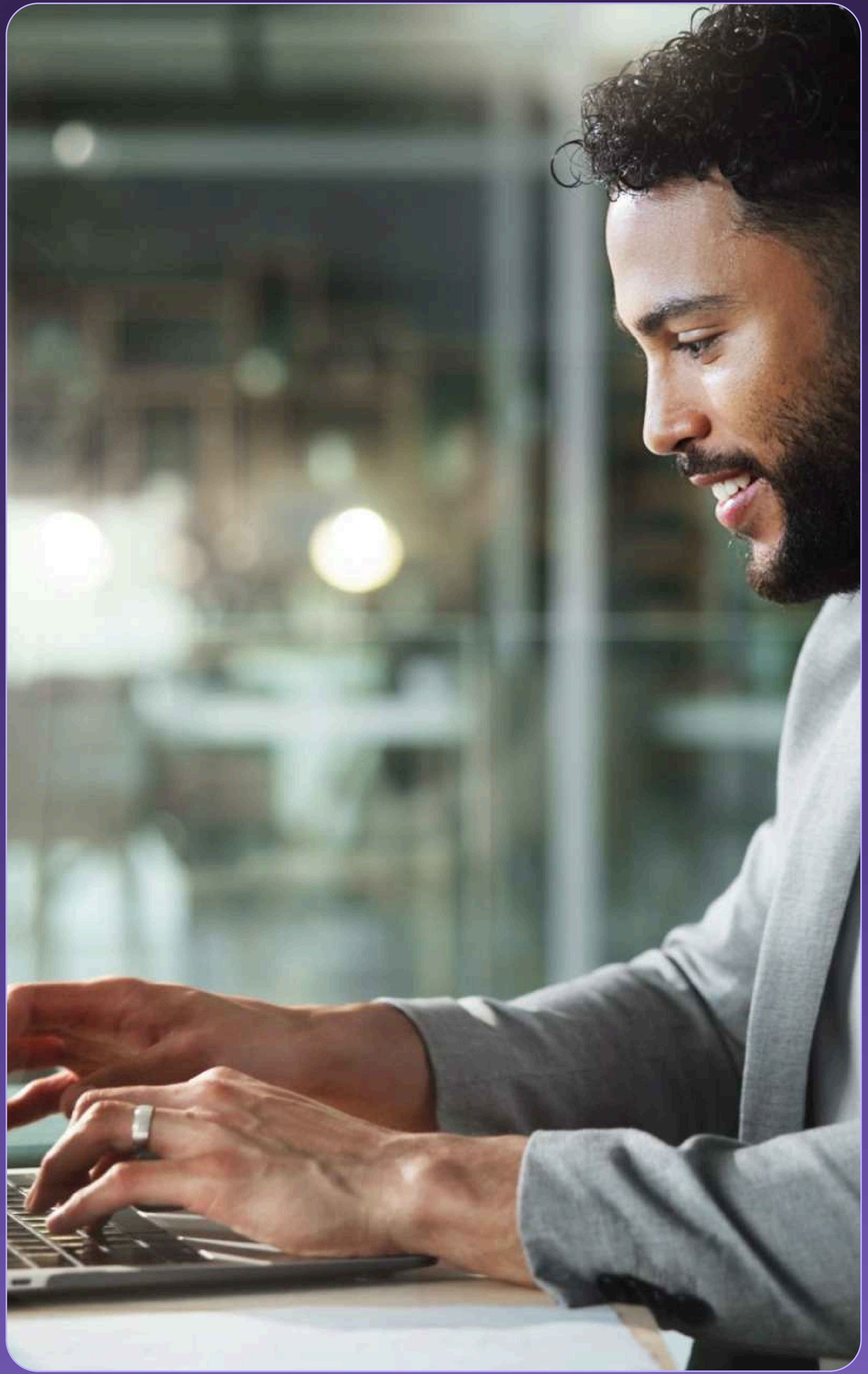
The moment: You want to know which companies or organizations are showing up in force, not because someone asked, but because it's exactly the kind of signal worth acting on before the event, not after it.

The prompt:

> "What are the top 10 companies by number of registrants? Show me their attendee count and titles, and flag any account sending 5 or more people."

What comes back: A ranked list of organizations by registrant count, with job titles included and any account sending five or more people flagged directly.

What it unlocks: An account sending a group that size is telling you something before you've had to ask them directly: real, organizational interest in your event, not just individual curiosity. That's the moment to loop in sponsorship or account management, while there's still time to build on it, not after the event has already happened.



10. Find duplicate registrations

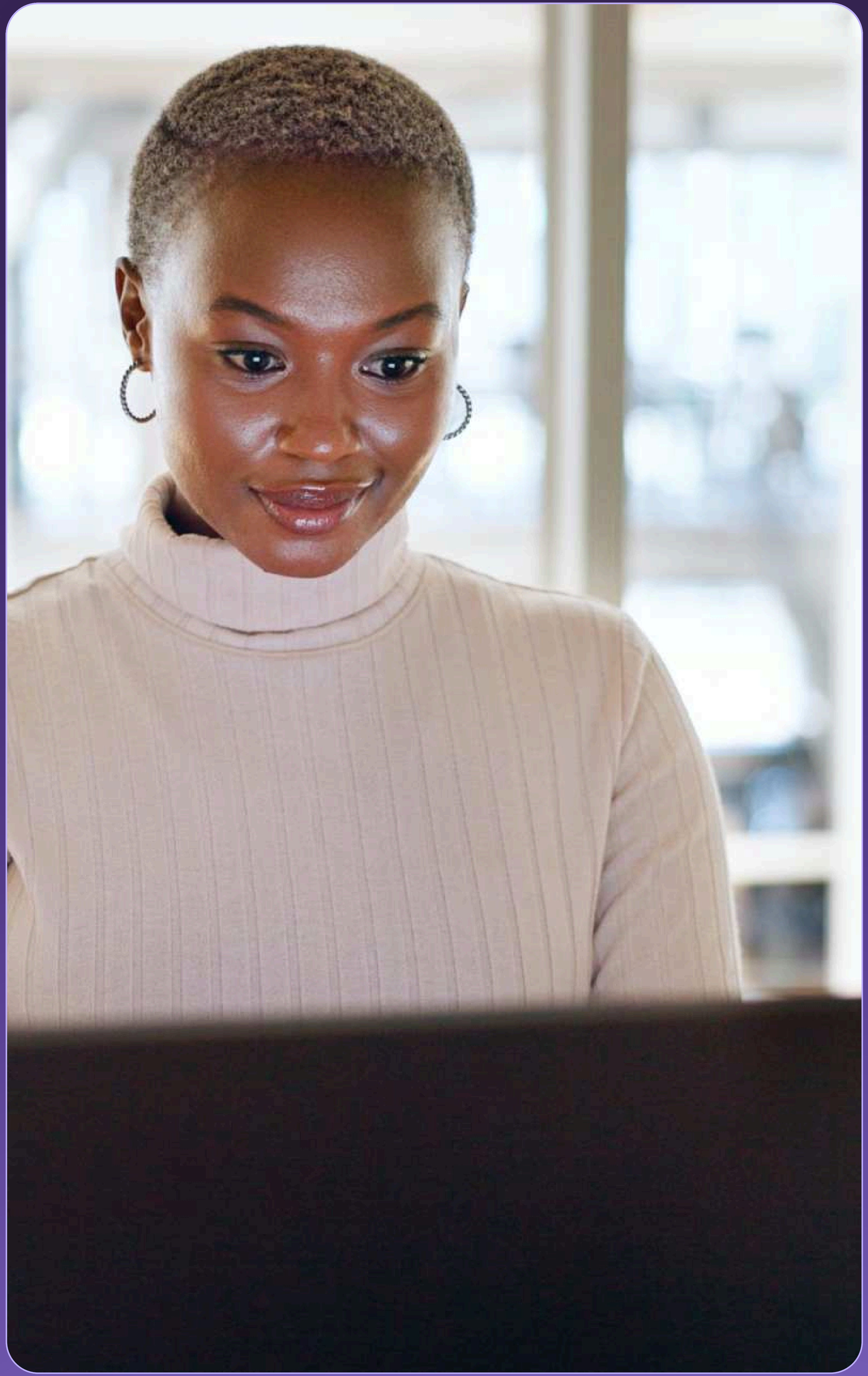
The moment: Someone flags that a name looks familiar, or finance can't reconcile a payment, and you suspect the same person registered twice.

The prompt:

"Find duplicate registrations, the same person registered twice or under different email addresses."

What comes back: A list of likely duplicate pairs, with the matching fields shown so you can see why each pair was flagged.

What it unlocks: Duplicate records are one of the most universal, most manual headaches in event management, normally caught by accident, weeks later, by whoever happens to notice. This prompt turns an occasional accident into something you can run on demand. It flags the pairs; merging them is still a manual step for now, but knowing exactly which records to merge, and why, is most of the work.



11. Get a clean revenue breakdown

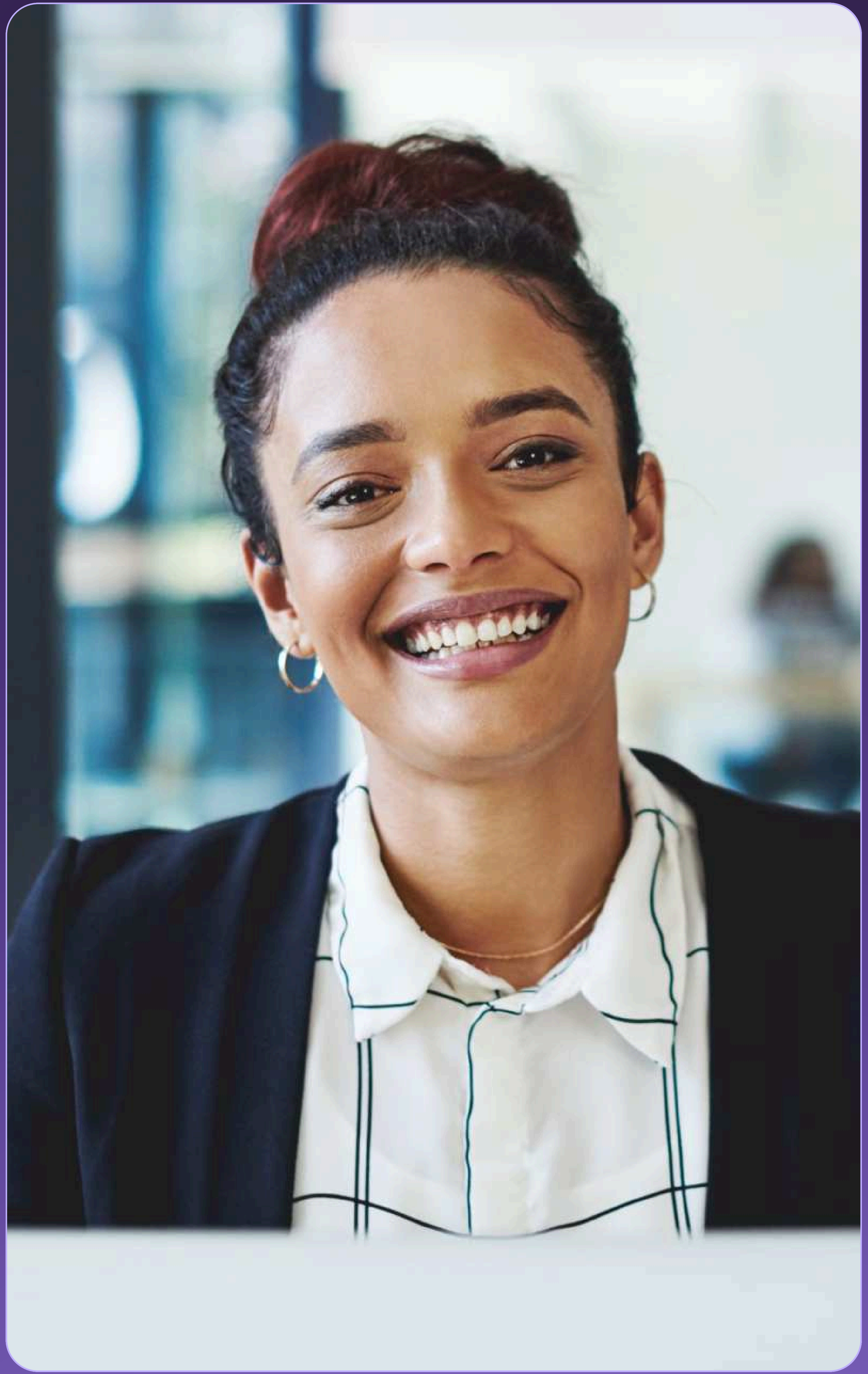
The moment: Finance, your board, or a client wants a revenue snapshot, and "how much have we made so far" isn't specific enough on its own. You need the number split into pieces that actually explain where it came from, not a total sitting on its own with no shape to it.

The prompt:

> "Show me total revenue collected so far across registrations, functions, and sponsorship or exhibitor sales, broken down by registration type and payment method."

What comes back: A revenue table split by registration type and payment method, covering registration fees, function ticket sales, and sponsorship or exhibitor income together.

What it unlocks: A single number tells you where you are. A breakdown tells you where to focus. If one registration type is quietly outperforming, or one payment method is carrying more risk than it should, this is the prompt that surfaces it, and it's the same underlying question whether you ask it mid-campaign or after the event closes.



12. Get a finance-ready list of outstanding balances

The moment: Finance is chasing payments and a raw list of names with no sense of priority just becomes another spreadsheet someone has to sort through manually.

The prompt:

> "Provide a list of all invoices issued in the last 30 days showing contact name, registration type, registration date, company, invoice type, invoice status, currency, and amount."

What comes back: Recent invoice records with contact, registration, company, status, currency, amount, and related payment activity on the same contact.

What it unlocks: With invoice dates and payment activity side by side, you can follow up with questions like "Which of these appear to still be outstanding?" or "Which contacts have payment activity but no obvious settlement against the invoice yet?" so finance can focus on what needs attention first.

13. Answer a partner organization's "how many of ours are attending" question

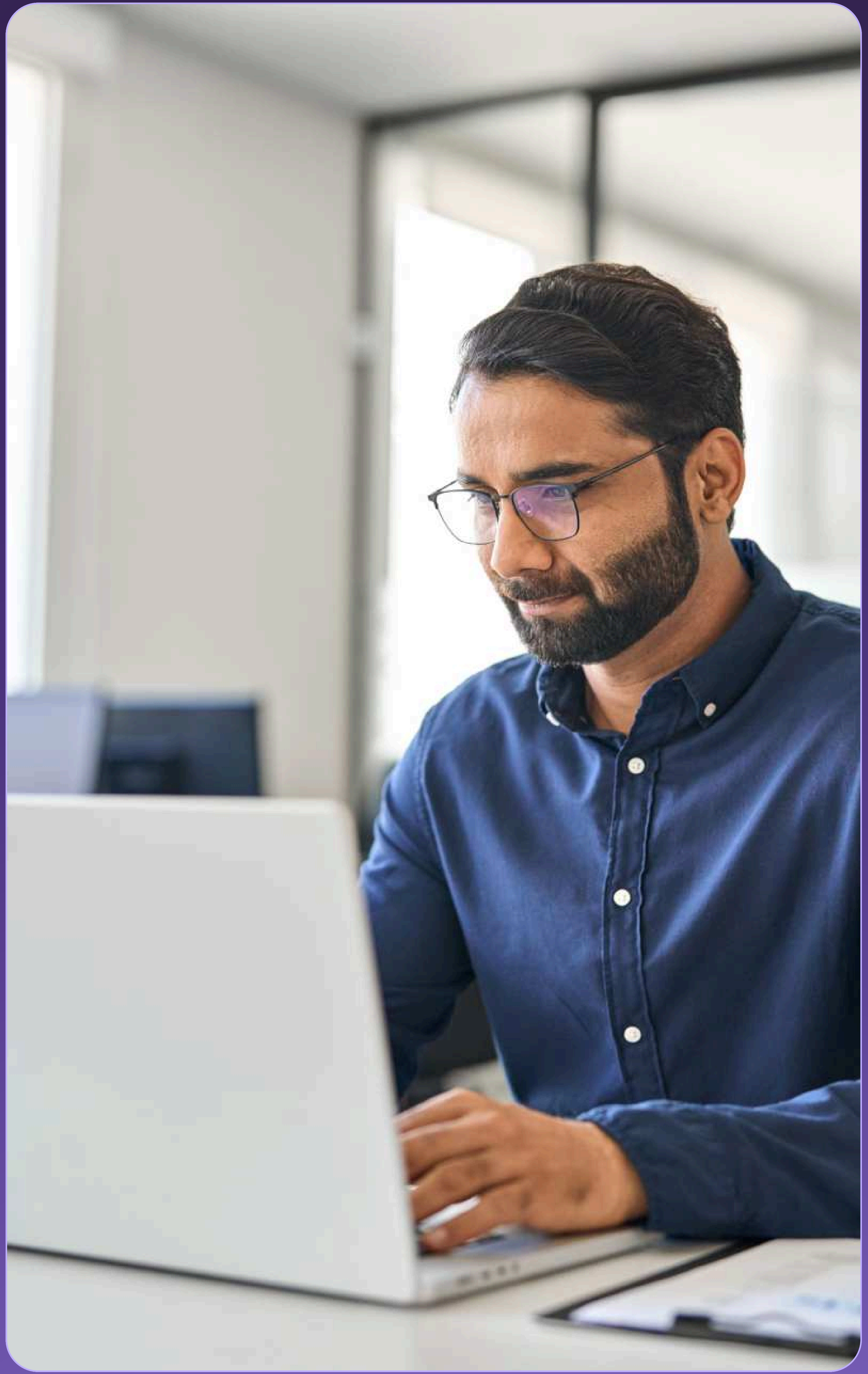
The moment: A partner organization bought a block of seats and let their own staff register individually. Now their contact wants to know exactly who from their team actually went through with it, and what they signed up for, something you can see immediately, and they usually can't.

The prompt:

"How many people from <company> are registered, and what have they registered for?"

What comes back: An organization-filtered attendee list with each person's registrations and selections attached.

What it unlocks: This is useful well beyond answering the question in front of you. Ask a follow-up like "Flag which of these people haven't completed their session selections yet" so you can close the gap before the partner notices it themselves.



14. Get three things you can act on before tomorrow morning

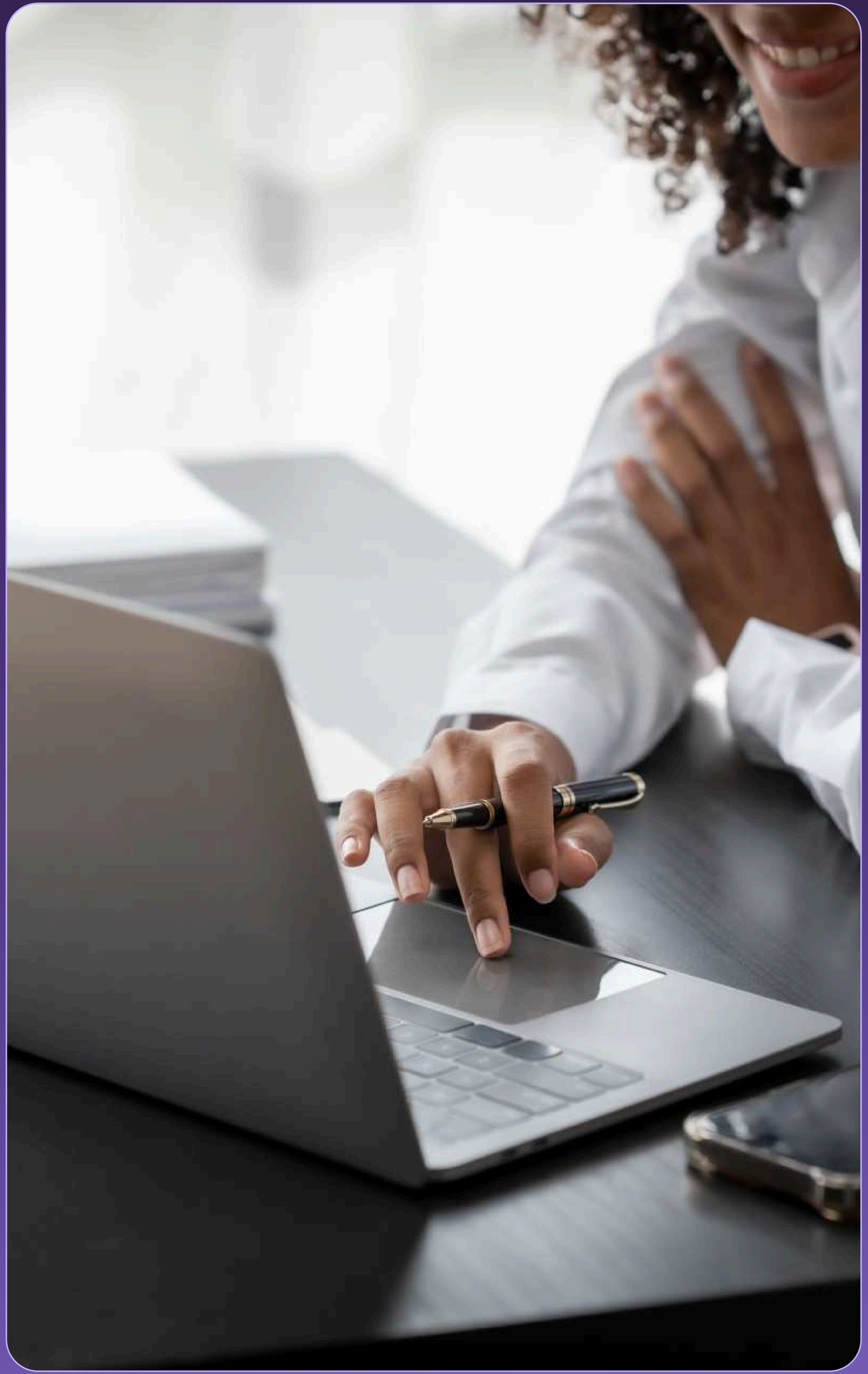
The moment: You're mid-event, it's the evening of Day 1, and you want to know what's worth fixing before doors open again tomorrow, not a full readout of every comment left so far.

The prompt:

> "Day 2 starts in 12 hours. Analyze all survey responses received today and give me three things I can act on before tomorrow morning."

What comes back: Three prioritized, actionable insights, often anchored with a specific comment or two as evidence for each one, not just a generic bullet point.

What it unlocks: This works by finding the pattern across many comments that no single one would reveal on its own: a recurring complaint about room temperature, a theme in the same three sessions, a signal that's easy to miss reading feedback one response at a time. The "today" and "before tomorrow morning" framing is what filters this down to what's genuinely actionable in the time you actually have left, rather than a general summary of sentiment so far.



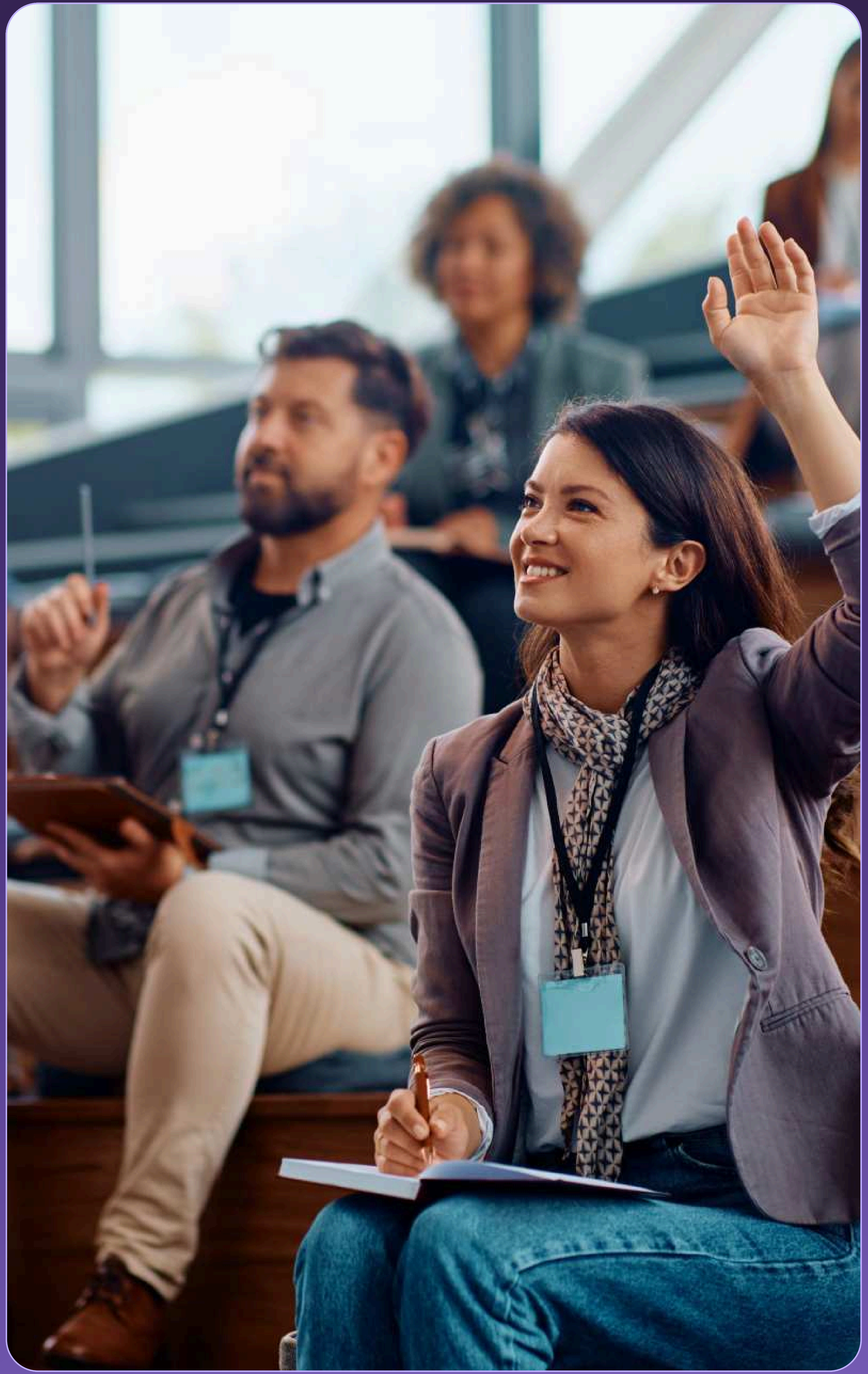
15. Compare feedback across session formats

The moment: You're running a mix of formats this event: workshops, panels, roundtables, and you want to know which style is actually landing with attendees, not just whether people liked the content.

> "What are attendees saying in the session feedback surveys? Break it down by session format and tell me which styles are resonating most."

What comes back: Themes extracted from session feedback, grouped by format, with representative comments attached to each.

What it unlocks: This is the prompt to run before you lock in next year's format mix. If roundtables are consistently outperforming panels, that's a steer for your program design, not just a nice-to-know.



16. Check how many people have actually shown up today

The moment: It's an hour before lunch, catering needs an updated headcount so they can adjust in real time, not the number you provided weeks ago.

The prompt:

"How many people have checked in today, and what percentage of registered attendees is that?"

What comes back: A check-in count and the percentage against total registrations.

What it unlocks: Next, ask Planner Assistant to build this as a chart. From there, you can save it and refresh the data throughout the event to see live changes, rather than asking the same question every hour and reading the answer as a fresh number each time.

17. Get a full, honest comparison against last year

The moment: This is different from checking your pacing mid-campaign. The event is over, and you want the complete picture, registration, attendance, and finance together, not just the registration numbers you were watching while it was still live.

The prompt:

> “Give me a full summary of <this year's event>, covering registration, attendance, and finance. Then switch to <last year's event> and pull the exact same breakdown. Compare the two and tell me what's changed.”

What comes back: A comprehensive cross-module comparison covering registration, attendance, and finance, including a direct difference column showing exactly what moved between the two events, not just the two totals sitting side by side.

What it unlocks: A comparison shows you what changed. The more useful question is why. Pick the shift that surprises you most and ask directly: "Why did attendance grow but revenue stay flat?" That's what turns a comparison table into something you can act on for next year.

18. Find out which registration types actually drove revenue

The moment: You're building the post-event debrief, and "we made X" doesn't tell your board or your client anything about where that money actually came from.

The prompt:

"Which registration types generated the most revenue?"

What comes back: Revenue per registration type, with the highest-contributing types called out directly in the answer itself, not left for you to spot in a table.

What it unlocks: Asking a follow-up like "What percentage of total revenue did each of these represent?" puts the ranking in context, not just the order. This can surface something genuinely non-obvious: late registrations might make up only 10% of attendees but 40% of income. That's not a number you'd necessarily go looking for, but once you see it, it reframes how you think about early-bird pricing and late-registration strategy for the next event. From there, ask Planner Assistant to "visualize this as a chart" so the split is obvious at a glance.

19. Generate a post-event executive summary

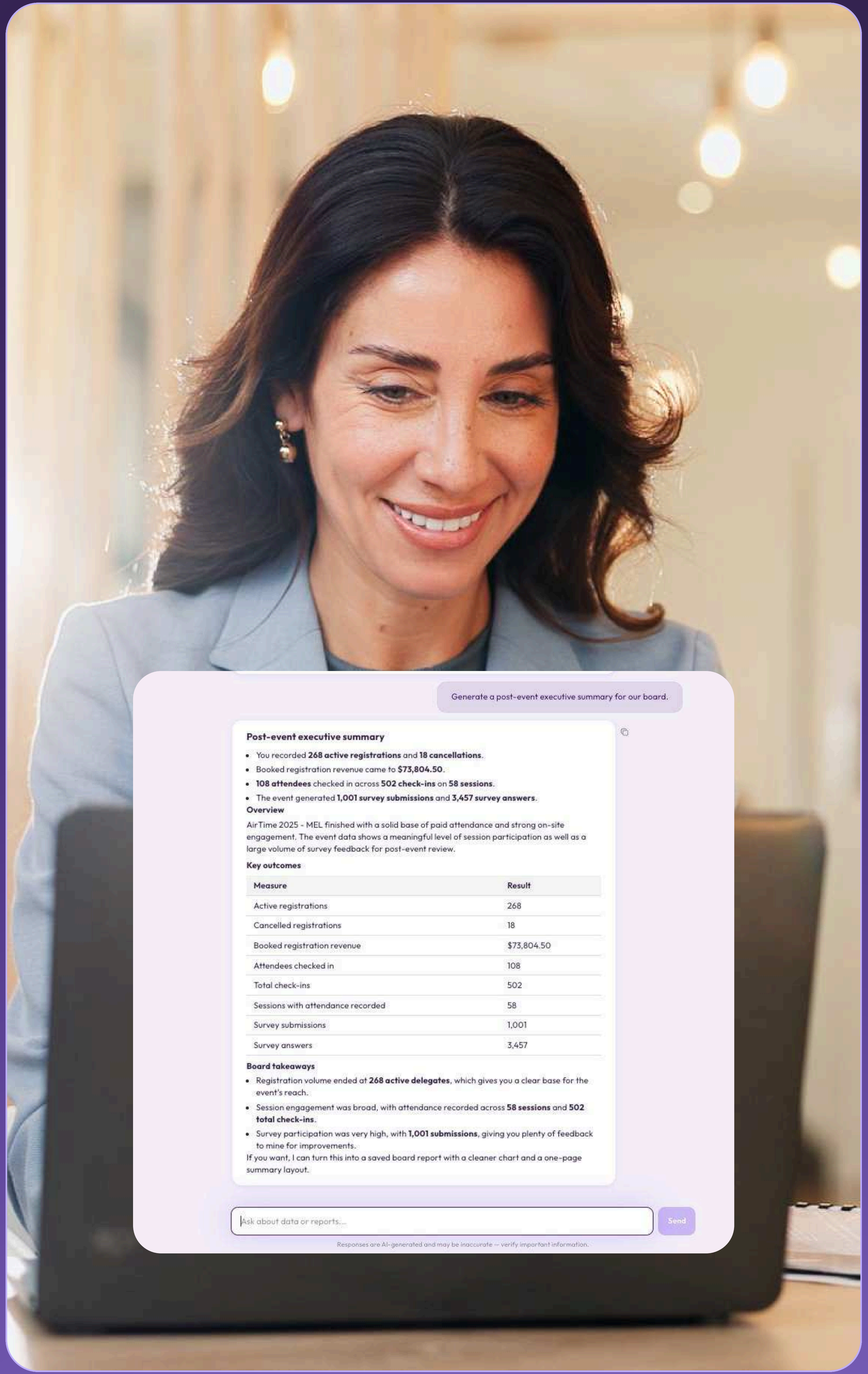
The moment: This is for when someone wants the full record of what actually happened this time: not recommendations, but registration, attendance, revenue, and feedback pulled into one document.

The prompt:

> "Generate a post-event executive summary for our board, with a concise summary table, a few headline takeaways, and expanded commentary under each takeaway."

What comes back: A broad executive summary spanning registration, attendance, finance, and feedback in a single document.

What it unlocks: The same summary rarely suits every audience. Ask a follow-up like "Shorten this to five bullet points for the board" to reshape it for whoever's actually reading it, without starting over from the raw data.



20. Ask what to actually change next year

The moment: The debrief is booked, stakeholders are expecting recommendations rather than a data dump, and turning a full season's worth of event data into a short, defensible list of priorities isn't something you want to start from a blank page.

The prompt:

> “Based on all the event data, including registration, revenue, session attendance and feedback, what are the top five things I should change for next year, and why?”

What comes back: Recommendations grounded in the actual event data, each with a stated reason, and any data gaps flagged up front rather than glossed over.

What it unlocks: The first pass is deliberately broad, so you can see what surfaces before deciding where to dig in. Narrow it with a follow-up like “Focus only on what would improve attendee satisfaction” or “Just registration and communications.”

Tell us what's worked

This playbook will grow as more of Planner Assistant moves from roadmap to reality. If a prompt here didn't get you the answer you expected, or you've found a use for it we haven't covered, the fastest way to tell us is to ask Planner Assistant directly. Your feedback shapes what we test and build next.