

CASE STUDY

The Insurance Institute of Bournemouth

Professional • Enthusiastic • Fun



The Background

The Chartered Insurance Institute (CII) is the leading professional body for the global financial services profession, promoting higher standards of integrity, technical competence and business capability throughout the insurance and financial sectors. There are Local Institutes throughout the UK, the one located in Bournemouth required assistance with their Annual Dinner event management.



Council Members of The Insurance Institute of Bournemouth

Why The Passionate PA?

Each Local Institute is required to hold an Annual Dinner to celebrate their work each year. In 2014, Alan Boyce, President of the Insurance Institute of Bournemouth (2013-16) decided he wanted to outsource the planning and on-the-day management of this large event in order to relieve his Council Members of the time consuming task. Alan chose The Passionate PA after a recommendation from Susan Reeves at Alan & Thomas. Susan had experienced our event management services offered to the Dorset branch of the Institute of Directors and so believed the synergy between the two Institutes would enable The Passionate PA to understand the professionalism required by members of the CII.

Our Work Together

Whilst Alan was president of the Bournemouth Institute, he worked closely with The Passionate PA to plan Annual Dinners for 2014, 2015 and 2016. He'd never worked with an event management specialist, or executive PA before so The Passionate PA led the process of planning and hosting a three course sit down meal with after dinner entertainment for 140+ guests.



Alan and Kate

Our work included:

- ✦ Briefing meetings
- ✦ Compiling an event budget and detailed action plan
- ✦ After dinner entertainment research
- ✦ Sponsor liaison and agreements
- ✦ Designing e-invitations, signage, event programmes and other marketing materials
- ✦ Management of all bookings with RSVPs, menu choices, dietary requirements and invoices for tickets
- ✦ Room plans, table plans etc.
- ✦ Supplier management: Speakers, Toast Master, Venues, Hotels, Photographers, Printers etc.
- ✦ On the day organisation and attendance at dinner
- ✦ Running the raffle on the night, and securing prizes, raising huge amounts of money for charities



The Client's View

Alan's feedback after his last year as President:

"Kate is a very positive person and that comes through in the enthusiasm that she shows for dealing with any task that you ask her to deal with. An initial discussion of what is required is turned into a quote with a detailed list of what the project will encompass with a timetable of when things need to be done. I really liked this level of detail.

Regular updates to make sure the project is kept on track and good liaison with all of interested parties from the sponsors, the table hosts and guests through to the Toastmaster and the speakers – The Passionate PA can be relied upon to ensure all communication is timely and thorough.

Kate, and her colleague Debbie, are fun to work with and that makes any project more enjoyable. Problems are going to arise and the way in which they are dealt with is the test of a really efficient Event Organiser and in that regard Kate excels. I wouldn't hesitate to recommend The Passionate PA to other Local Institutes or indeed any professional body looking for exceptional, bespoke event management."



Kate and Debbie, ready to welcome guests at the 2016 Annual Dinner

The Suppliers View

In 2016, the after dinner speaker was John Simonett, one of Britain's most entertaining and original speakers.

"As a professional speaker I work with many PAs leading up to an event - and I have to say Kate has been the best! In the weeks leading up to the annual dinner of the Insurance Institute of Bournemouth Kate kept me fully informed of all the event details, sent me the running order, table plans, room layout diagrams and guest list, booked my hotel, and answered all my questions in a telephone briefing. In other words she dotted every "i" and crossed every "t"! On the night she was helpful and accommodating, helping with a late request from me to adjust the seating on my table, and oversaw the running of the event with a cheerful, calm and unflappable efficiency. She is indeed a "Passionate PA" and a pleasure to work with - bravo Kate!"

