

REQUEST FOR CLIENT BRIEF TEMPLATE

This guide will assist you in taking enquiries from clients who are planning to host a business event in your region or at your property. It outlines a series of questions that you should ask and while not all sections may be relevant to every enquiry, we hope that this template helps to streamline the client brief process. Writing down the different requirements for a client will ultimately help you tailor the proposal successfully and meet the client’s needs and expectations for their event. For further assistance, please contact Destination NSW’s regional NSW Business Events Specialists at conferencing@dnsw.com.au or call (02) 9931 1111.

RECOMMENDED TEMPLATE FORMAT

Client Profile			
Client Organisation			
Client contact name		Position	
Email		Phone	
Client Address/ PO Box			
Client Type & Industry			
Is commission required? (PCO only)	<input type="checkbox"/> 10 % across the board <input type="checkbox"/> 10 % accommodation only <input type="checkbox"/> 10% food and beverage <input type="checkbox"/> Other:		
Decision maker/s			

Event Specifics			
Event Name			
Event dates			
Are dates set or flexible? Y / N	Alternate Dates?	Format Day/s	
Event description			
Event objectives			
Event theme			
How will success be measured?			

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History of event I.e. previous venues?	
Project dependencies	
Decision making timeline	
Key decision making criteria	
Other destinations/ venues considered	

Delegates								
Number of delegates								
Describe a typical delegate?								
Delegate profile	Intrastate %		Interstate %		International %			
	Male %		Female %					
	Partner program		Family program		Board members			
	Self-funded		Corporate funded		Speakers			
Transport	Flights		Bus/ train		Transfers required		Self-drive	

Accommodation						
Residential room block	IN		OUT			
() Onsite () Offsite	Room type		No. of rooms		Nights	
	Room type		No. of rooms		Nights	
	Room type		No. of rooms		Nights	
Shoulder bookings						
Notes						

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Event format				
Day 1	Day 2	Day 3	Day 4	Day 5

Business event requirements				
Plenary room	Pax		Setup: (Circle) Cabaret / Theatre / Classroom / U shape / Boardroom	
Requirements				
COVID-19 Room Capacity				
Breakout rooms	No. of breakouts		Setup per room: (Circle) Cabaret / Theatre / Classroom / U shape / Boardroom	
Requirements & capacity per room				
COVID-19 Room Capacity				
Exhibition	No. of exhibitors		Dimension of booths	() 2 x 3m () 3 x 3m () trestle tables
Bump in/ bump out requirements				
COVID-19 Room Capacity				
Catering	() Full Day DDP () Half Day DDP () Arrival tea & coffee () Morning Tea () Lunch () Afternoon Tea () Healthy Options () Low sugar/carb			
Other dietary considerations				
Catering space	() Exhibition Area () Working Lunch () Pre Function Area () Outdoors			
Audio visual	() Data projector () Wi-Fi () Other: () Screen () Video conferencing () Whiteboard () Green room			

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	<input type="checkbox"/> Flip chart/s		<input type="checkbox"/> AV Technician
Other space requirements	Event Secretariat Storage Styling/ theme Signage		
Social event requirements			
Welcome reception <input type="checkbox"/> In house <input type="checkbox"/> Offsite	Pax		Catering Food: <input type="checkbox"/> Cocktail ___ hours Beverage: <input type="checkbox"/> Drinks package ___ hours <input type="checkbox"/> Drinks on consumption <input type="checkbox"/> Regional tasting
Notes			
Dinner 1 Name: <input type="checkbox"/> In house <input type="checkbox"/> Offsite	Pax		Catering Food: <input type="checkbox"/> 3 Course <input type="checkbox"/> A la carte <input type="checkbox"/> Set menu <input type="checkbox"/> Cocktail Beverage: <input type="checkbox"/> Drinks package ___ hours <input type="checkbox"/> Drinks on consumption <input type="checkbox"/> Regional tasting
Notes			
Dinner 2 Name: <input type="checkbox"/> In house <input type="checkbox"/> Offsite	Pax		Catering Food: <input type="checkbox"/> 3 Course <input type="checkbox"/> A la carte <input type="checkbox"/> Set menu <input type="checkbox"/> Cocktail Beverage: <input type="checkbox"/> Drinks package ___ hours <input type="checkbox"/> Drinks on consumption <input type="checkbox"/> Regional tasting
Notes			

Destination requirements	
Partner/ family program requirements	
Team building activities	
Local cultural education	
Technical site tours	
Local tourist attraction requirements	



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Quotes	
What date do you require this proposal?	
How would you like this proposal sent?	
What additional information would you like with the proposal? I.e. images/videos/floorplans	