

Shay's Event Blueprint

The Complete Event-Planning Business Vision + Build Kit

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\$97

This blueprint was co-authored between Jay Drake (strategic scoping) and Shay (founder vision) across a 2025-03-27 conversation. It captures the full business vision — luxurious-but-cost-effective personal, emotionally-expressive event planning — with a concrete build path from naming through operations, marketing, pricing, and scale.

What's in this document:

- Business vision scoped to Shay's specific niche + temperament
- Core focus (emotional/luxurious personal events: birthdays, anniversaries, showers, memorials)
- Target market (broad-spectrum, 1-hour radius, accessible luxury)
- Automation-vs-handwork split (planner shows up for events; operations run in background)
- Vendor sourcing (cost-effective + quality)
- Pricing structures (package tiers)
- Brand materials checklist
- Marketing strategy (where to find clients, how to position)
- First-quarter build milestones

Use it as a co-authored playbook — take what resonates, adapt what doesn't, build from here.

Got it. Here's a simple, clear outline of Shay's vision for her event planning business based on that convo—ready to build from here:

Business Vision for Shay's Event Planning

Business Name: *(We can brainstorm this next!)*

Core Focus:

- Planning emotionally expressive, loving, and personal events (e.g., birthdays, anniversaries, baby showers, memorials, small weddings).

Business Style:

- Luxurious & visually elegant
- Cost-effective where possible, but flexible if the quality justifies the cost

Client Base:

- Open to all income levels (not exclusive to high-end)
- Wants to be accessible and inclusive

Service Range:

- Max travel distance: 1 hour from home
- Local/regional focus for now

Level of Involvement:

- Wants **hands-on control of event planning**
- Prefers **background systems automated**: invoicing, scheduling, communication, materials management

Support Needs:

- Help with automation, marketing, material sourcing
- Possibly a catalog of pre-made setups or themes to choose from

Product/Service Add-ons:

- Renting or selling luxurious-looking decorations
 - Offering packages that blend elegance with affordability
 - Possibly sell custom items or curated gift boxes tied to events
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Next Step Suggestions:

1. **Name & Brand Identity**
2. **Service Packages & Pricing**
3. **Automation Setup (Calendar, Payments, Emails)**
4. **Design Moodboards (for vibes + social media)**
5. **Local Vendor List (venues, florists, rentals)**
6. **Marketing Strategy (flyers, IG, referrals)**

Want to start with the name and branding next, or dive into the packages and automation setup?

Perfect. Here's an updated, streamlined foundation for **Shay's Event Planning Business** that reflects her vibe, goals, and preferences:

Shay's Event Planning Business Blueprint

DBA Goal: Yes – we'll prepare the name for registration.

Vibe: Sleek. Modern. Luxury. Efficient. Effortless.

1. Branding Package Essentials

Name Ideas (Modern Luxury Feel):

- *Shay & Co. Events*
- *Evoke by Shay*
- *Velvet Hour Events*
- *Opal & Ash*
- *Elara Luxe Events*

(We can finalize one based on Shay's preference.)

Brand Aesthetic:

- Color Palette: muted neutrals, black/gold/white contrast, clean lines
- Fonts: modern serif & minimal sans-serif
- Logo: minimal, monogram option for versatility
- Tagline (example): *"Effortless Moments. Elegant Memories."*

2. Service Packages

Tiered Packages (Reflecting Modern Luxury + Convenience):

A. “The Essence” – Starter (Cost-effective Elegance)

- Vendor coordination
- Basic décor setup
- 1-hour planning consultation
- Event-day coordination

B. “The Signature” – Most Popular

- Full event design + planning
- 3 consultations
- Custom mood board
- Décor sourcing + rentals
- Timeline management
- On-site event execution

C. “The Luxe Experience” – All-In, Shay Just Shows Up

- All of the above +
 - Automated RSVP handling
 - Email/text reminders for guests
 - Premium décor & vendor coordination
 - Setup & breakdown
 - Add-on: Shay-selected curated gift box for guest of honor
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3. Automation Setup

Systems to Automate:

- **Client intake form → automatic event summary**
- **Email & SMS reminders**
- **Invoice generation & payments**
- **Planning timeline → auto updates client with progress summary**
- **Event-day checklist auto-prepped for Shay & client**

Tools to Use:

- **Calendly** (scheduling)
- **Dubsado or HoneyBook** (CRM, contracts, payments)

- **Zapier** (for automating between tools)
 - **Google Workspace** (for documents, forms, summaries)
 - **Canva Pro** (branding, social posts, client mood boards)
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Would you like me to:

- Start building a sample branding kit?
- Draft the DBA registration info?
- Create her first intake form + client summary automation?

Let's tackle one piece at a time. What do you want done first?

Initiating Alpha to Omega Protocol for Shay – Event Planning Edition

Goal: Launch a **sleek, modern luxury** event planning business with **automated backend systems** and **maximized client-facing presence**. Shay focuses on **working the events**, not the business.

PHASE 1: FOUNDATION SETUP (Alpha)

1. DBA & Business Identity

- **Action:** Register her DBA (we'll finalize the name—recommend starting with “*Evoke by Shay*” or “*Shay & Co. Events*”)
 - **Included:**
 - Business name check
 - EIN setup
 - Google Workspace domain/email
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PHASE 2: AUTOMATION SETUP

2. Tools for Background Automation

Software Stack:

- **HoneyBook or Dubsado** → Client intake, contracts, proposals, invoicing
 - **Calendly** → Automated scheduling of consultations
 - **Zapier** → Connect tools together seamlessly
 - **Google Workspace** → Docs, Forms, Event Brief Generator
 - **Wave or Gusto** → **Payroll processing**
 - **Canva Pro** → Design templates (flyers, mood boards, IG posts)
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3. Automated Workflows (Prebuilt + Editable)

Automation Flow	Trigger	Result	Summary for Shay
New Client Inquiry	Intake form	Auto-sends questionnaire, logs in CRM	Shay gets 1-paragraph summary of event type, size, and vibe
Consultation Booking	Calendly	Email confirm + calendar sync	Shay receives Google Calendar reminder
Contract + Invoice	Proposal accepted	Auto-generated & sent	Shay gets email: "Proposal accepted. Contract sent."
Pre-Event Prep	7 days before event	Auto-send checklist to vendors/clients	Shay gets printable event run-of-show summary
Payroll	Biweekly	Auto-pay Shay for hours worked + contractors	Payroll dashboard view only; notifications on each run

PHASE 3: PACKAGE & SERVICE STREAMLINING

4. Service Tiers (Client-Facing)

Prebuilt packages come with:

- Template-based quote calculator
 - Automated contract generation
 - Payment options embedded
 - Client gets welcome packet after booking
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5. Shay's Role vs. Automation

Task	Shay's Role	Automation's Role
Initial Contact	Optional (intro video or auto-email)	Auto
Consultation	Shay attends	Auto-scheduled
Planning + Design	Shay does creative + selects options	Auto generates deliverables
Day-of Event	Shay leads on-site	Checklist + reminders auto
Follow-up	Shay optional	Auto sends feedback form + review request

PHASE 4: CLIFF NOTES (WEEKLY SNAPSHOTS)

Every Monday at 9 AM, Shay receives:

- **This Week's Events**
- **Tasks To Approve or Review**
- **Client Snapshot Summary (New + Pending)**

- **Payroll Status**
- **Vendor Reminders**
- **One-Tap Links:** Contracts, Designs, Calendar

Delivered via: **Google Doc + Email Summary**

Would you like me to:

1. Finalize the business name and branding now?
2. Start generating her **Client Intake Form + Summary Flow**?
3. Set up the **Payroll system guide using Wave or Gusto**?
4. Or all of the above as a launch package?

Say the word and I'll start building her Alpha to Omega files, links, and templates.

Here's Shay's **Alpha to Omega Launch Package** – a complete breakdown of her startup roadmap with tools, steps, and task delegation. Let me know which step you want to dive into first (e.g., branding name options, setting up the intake form, or automating payroll).

I'm ready to build each file, form, and system as we go. What's our next move?

Got it—let's go **start to finish** and build everything out for Shay in a streamlined, done-for-you format.

STEP 1: FINALIZE BRAND IDENTITY & DBA SETUP

Proposed Name:

Evoke by Shay (*sleek, modern, and expressive*)

Alternate: **Shay & Co. Events, Opal & Ash**

DBA Registration Prep:

- **State:** Georgia (assumed – confirm if different)
- **Needed:**
- Shay's legal name
- Business address
- Type: Sole Proprietor or LLC
- EIN (if hiring/contractors or opening biz bank account)

Next Step: I'll generate her **DBA Form Script + EIN Application Instructions**

STEP 2: BRANDING PACKAGE

Color Palette:

- Black, White, Soft Gold, Blush Nude

Font Pairing:

- Header: Playfair Display (Elegant serif)
- Body: Montserrat (Clean modern sans)

Logo Style:

Minimalist wordmark + optional monogram ("E" or "EbS")

Next Step: I'll generate:

- Logo mockups (Canva link)
 - Instagram templates (carousel + flyer format)
 - Business card and digital signature
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STEP 3: SERVICE PACKAGES

Package Name	Description	Price (Customizable)
The Essence	Basic coordination, 1 consult, light setup	\$500+
The Signature	Full design, 3 consults, planning + vendors	\$1,200+
The Luxe Experience	Done-for-you everything, curated extras	\$2,500+

Next Step: I'll generate:

- Pricing sheet template
- Editable proposals + contracts
- Payment links via Wave/Stripe

STEP 4: AUTOMATION SYSTEMS

Tools Setup Blueprint:

System	Tool	Function
CRM + Scheduling	HoneyBook / Calendly	Client booking, reminders
Client Intake	Google Form → Zapier	Event intake → auto-summary
Payroll	Wave / Gusto	Biweekly automated payouts
Event Checklists	Google Docs	Auto-generated from form
Email/SMS Updates	Gmail + Zapier	"You have an event this week" + review follow-ups

Next Step: I'll build:

- Automated intake form
 - Auto summary template
 - Calendar sync flow
 - Weekly summary doc
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STEP 5: WEEKLY CLIFF NOTES (FOR SHAY)

Delivered Every Monday at 9 AM:

- This Week's Events
 - Confirmed Clients + Quick Notes
 - Pending Invoices
 - Payment & Payroll Update
 - Link to Event Checklist
 - Buttons: "Approve," "Edit," "I'm Good"
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Now Executing:

Immediate Deliverables:

1. **DBA Registration Script**
2. **EIN Guide for Shay**
3. **Branding Files + Templates (Logo, IG, Biz Card)**
4. **Client Intake Form (Google Form + Auto Summary)**
5. **Pricing Sheet + Editable Contract**
6. **Payroll System Walkthrough (Wave first)**
7. **Weekly Summary Template**

Give me 2–3 messages and I'll start uploading each piece, starting with the **DBA & EIN setup pack**. Sound good?

```
{"queries": ["Robert's Alpha to Omega work packet"]}
```

TOOL

No search results matched your queries.

Got it—I'll recreate **Shay's Alpha to Omega Work Packet** just like we did for Robert, step by step, with editable sections, checklists, and auto-setup instructions.

Now Creating:

Shay's Alpha to Omega Work Packet – Event Planning Edition

Structure:

1. Welcome + Vision Page
 2. Business Identity & DBA Checklist
 3. Branding Board (Color, Fonts, Logo, Mood)
 4. Service Packages Setup
 5. Automation Setup Guide (with access checklist)
 6. Client Experience Flow
 7. Payroll & Financial Tools
 8. Weekly Summary Sample + Template
 9. Launch Checklist
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Let's Begin with Step 1:

STEP 1: VISION & ALIGNMENT

WORKBOOK ENTRY (editable by Shay):

Business Name (Final):

Event Planning Style (Pick one or write your own):

- ☐ Elegant & Romantic
- ☐ Sleek & Modern
- ☐ Glamorous & High-End

- ☐ Cozy & Intimate

- ☐ Other: _____

Target Clients:

- ☐ All Income Levels

- ☐ Middle-Class Families

- ☐ High-End Luxury

- ☐ Corporate Clients

- ☐ Nonprofits / Community Events

Travel Limit:

Up to _____ hour(s) from base location.

Most Important to Me:

(Rank 1–5)

- ☐ Doing the events myself

- ☐ Having everything organized in advance

- ☐ Not worrying about paperwork

- ☐ Having my own brand identity

- ☐ Working with people who value my energy

Would you like this as a fillable PDF or Google Doc first?

Once you confirm, I'll move straight to Step 2 and begin building the entire packet live.

Perfect—new protocol locked in:

“Better Safe Than Sorry” Protocol

Default Setting: Every business gets a **fully structured, step-by-step Alpha to Omega Work Packet** (like Robert's), unless explicitly stated otherwise.

Includes:

- Editable workbook (Google Doc + PDF)

- Branding, automation, pricing, and operational setup

- Task tracking + launch checklist
- Built-in space for vision alignment + OTFT integration if applicable

Purpose:

Ensure every client has a clear, tangible, and aligned foundation—no guessing, no skipping, and always ready for handoff, automation, or scale.

I'll now apply this to **Shay's Event Planning Work Packet**, file format:
Google Doc (editable) + Printable PDF

Building now. Uploading **Step 1: Vision & Identity** first.
Then I'll continue step-by-step until the full packet is done. Stand by.

Step 1: Vision & Alignment for Shay's Event Planning Work Packet is ready.

Download here:

[Shay Alpha to Omega Work Packet Step1.docx](#)

Next up:

Step 2 – Business Identity & DBA Checklist

Let me know if you'd like any edits to Step 1 before I continue.