

FREE PLANNING WORKBOOK

Wedding Planner & Coordination Service Selection Workbook

Choose the right planning role, compare service levels and proposals, understand what each fee buys, and hire for process, capacity, and scope - not package names alone.

DEFINE • COMPARE • EVALUATE • HIRE

Choose the Responsibility You Want to Transfer

Start with the work, not the title. The right professional is the one whose written scope begins where your own planning capacity should end.

1 DEFINE

Identify the planning work you no longer want to own.

2 COMPARE

Normalize service levels, deliverables, timing, team, and fee structure.

3 VERIFY

Use consultations, references, and contract terms to test the relationship.

CORE QUESTION

Are we still building the wedding, or do we mainly need someone to run it?

OUR CURRENT NEED

The 3-5 responsibilities we most want to stop managing:

What Do We Actually Need Help With?

Mark each responsibility according to who should own it. This creates the hiring filter before package names or prices enter the conversation.

Responsibility	We own	Need support	Professional must own
Venue strategy			
Vendor sourcing			
Proposal comparison			
Budget tracking			
Contract tracking			
Design / creative direction			
Rentals / production			
Logistics / transportation			
Timeline			
Vendor communication			
Rehearsal			
Wedding-day execution			
Setup / breakdown			

TOP RESPONSIBILITIES TO TRANSFER

1. _____ 2. _____ 3. _____ 4. _____

Identify Where the Wedding Actually Is

Service level should match the work that remains, not the service name that sounds most comprehensive.

CURRENT STAGE

- ☐ Nothing major booked
- ☐ Venue booked
- ☐ Major vendors booked
- ☐ Planning partly complete
- ☐ Most decisions finished
- ☐ Wedding highly organized
- ☐ Primarily need execution

STATUS SNAPSHOT

- WHAT IS COMPLETE?
- WHAT IS PARTLY COMPLETE?
- WHAT IS STILL OPEN?
- WHAT HAS BECOME HARD TO MANAGE?

SERVICE START SHOULD MATCH OUR REAL STAGE

Work already completed: _____

Work still unowned: _____

Planner, Coordinator, Venue Coordinator, or Designer?

Titles overlap. Compare ownership, timing, and the written scope instead of relying on the package name.

Role	Usually enters	Builds plan	Vendor management	Design	Wedding day
Wedding planner	Early / mid	High	Often high	Varies	Usually leads
Wedding coordinator	Final phase	Low	Final-stage	Usually no	Operational lead
Venue coordinator	Venue process	Venue only	Venue-related	No	Venue duties
Wedding designer	Design phase	Visual system	Design vendors	High	May lead visual setup

OUR ROLE TEST

- ☐ Major planning decisions are still unresolved
- ☐ The plan mostly exists; execution is the real gap
- ☐ The venue already covers some coordination
- ☐ Our primary gap is visual direction

Select the Amount of Responsibility to Transfer

Package names are shorthand, not standardized job descriptions. Compare the start point, ownership, work left with you, and final deliverables.

Service	Start point	Professional owns	Couple still owns	Typical deliverable
Full-service planning	Early	Broad planning + integration	Personal decisions + approvals	Planning system + execution
Partial planning	Mid-planning	Defined unfinished work	Completed / excluded areas	Selected planning deliverables
Month-of coordination	Final weeks	Handoff + final logistics	Earlier planning	Final timeline + execution
Day-of coordination	Shortly before	Narrow prep + execution	Highly organized plan	Execution-focused handoff
Design-only	After direction	Visual system	General logistics	Design plan
Consulting	Any stage	Advice / review	Implementation	Targeted recommendations

BEST FIT RIGHT NOW

Primary service: _____ Why it matches our stage: _____

Make Ownership Visible Before You Sign

A clean working relationship leaves no major responsibility floating between the couple, planner, coordinator, venue, and other specialists.

Responsibility	Couple	Planner	Coordinator	Venue	Other
Budget					
Vendor sourcing					
Contracts					
Design					
Timeline					
Rentals / production					
Guest logistics					
Ceremony					
Transportation					
Setup / breakdown					
Final vendor communication					
Emergency decisions					

OWNERSHIP GAP

Any responsibility with no clear owner: _____

Compare What You Actually Receive

Responsibilities describe effort. Deliverables reveal the concrete outputs that should exist when the service is performed.

Deliverable	Must have?	Planner A	Planner B	Planner C
Planning roadmap				
Budget tracker / updates				
Vendor shortlist(s)				
Design plan				
Master timeline				
Floor-plan review				
Handoff packet				
Rehearsal management				
Wedding-day management				
Post-event / breakdown support				

DELIVERABLE GAP

Which output matters to us but is missing from one or more proposals? _____

Test Where Responsibility Actually Changes Hands

The later the professional enters, the more organized your existing plan must be. Narrow service changes who completed the work before handoff; it does not erase that work.

Handoff question	Our answer
When does active service begin?	
What must already be complete?	
Which files must we provide?	
Who takes vendor communication?	
Who owns the timeline after handoff?	
Who resolves open logistics?	
What decisions still stay with us?	
When does wedding-day authority begin?	

HANDOFF RISK

What becomes a problem if the professional starts later than assumed? _____

Profile the Workload Before Interpreting the Price

Guest count matters, but operational dependencies, locations, production, staffing, and communication can change workload just as much.

Complexity driver	Low	Medium	High	Notes
Guest count				
Number of venues				
Number of vendors				
Destination / travel				
Transportation				
Rentals / tenting				
Lighting / production				
Room flip / simultaneous setup				
Cultural / religious logistics				
Large wedding party				
Design involvement				
Late-night breakdown				

OVERALL COMPLEXITY

[] Low [] Moderate [] High [] Complex in a few specific areas

Decode How the Planner Fee Is Calculated

The pricing model explains how the fee moves; it does not tell you whether the amount is good value for the work included.

Model	Understand	Watch for	Our proposal
Flat fee	Defined price for defined scope	Scope changes and extra-fee triggers	
Percentage	Percent of a defined spending base	Base, minimums, budget increases	
Hourly	Actual professional time	Estimated hours and billing increments	
Hybrid	Base fee + variable components	What is fixed vs. expandable	

PRICING QUESTIONS

- What part of the fee is fixed?
- What can make the fee increase?
- What spending is included in a percentage base?
- Are assistants, travel, overtime, or add-ons separate?

Identify What Can Expand the Planner Fee

Mark whether each factor is included, variable, separately charged, or unclear in the proposal.

Cost driver	Included	Variable	Additional fee	Unclear
Service duration				
Vendor count				
Number of locations				
Production complexity				
Wedding-day staffing				
Design scope				
Communication load				
Travel / destination				
Additional events				
Rehearsal				
Overtime				
Extra assistants				

LARGEST VARIABLE EXPOSURE

The item most likely to increase our final fee is: _____

Put Every Proposal Into the Same Frame

Price becomes meaningful only after service level, start point, staffing, deliverables, exclusions, and variable exposure are normalized.

Item	Planner A	Planner B	Planner C
Service level			
Start date			
Meetings / cadence			
Vendor sourcing			
Budget management			
Design			
Timeline			
Rehearsal			
Wedding-day hours			
Assistants / team			
Breakdown			
Travel			
Add-ons			
Current fee			
Variable exposure			

Build a Small, Comparable Planner Shortlist

You do not need the longest list. You need enough credible candidates to compare process, scope, capacity, and working fit.

Planner / company	Service	Availability	Relevant evidence	Inquiry	Consultation

SHORTLIST STANDARD

What would make us remove a planner before consultation?

Read the Portfolio for Capability, Not Just Aesthetics

Look for evidence that the planner has managed operational demands similar to yours. Style matters, but systems and judgment matter too.

Operational condition	Need evidence?	Planner A	Planner B	Planner C
Private property				
Multiple locations				
Destination / travel				
Large guest count				
Complex rentals / production				
Cultural / religious logistics				
Tight setup window				
Large vendor team				
Similar service style / flow				

PORTFOLIO QUESTION

What does the portfolio prove about planning capability - beyond the flowers, colors, and photography?

Use the Same Criteria for Every Planner

A charming consultation should not outweigh weak scope, unclear capacity, poor communication, or a contract that does not match the promises.

Criterion	Strong	Clarify	Red flag	Notes
Service fit				
Capacity				
Communication				
Team				
Vendor process				
Budget process				
Design fit, if relevant				
Logistics				
Contract clarity				
References				
Working fit				

OVERALL CONSULTATION RESULT

[] Advance [] Hold for clarification [] Remove from shortlist

Understand Who Is Actually Carrying the Work

The person selling the service may not be the person leading every meeting or working the wedding day. Verify team structure and capacity around your date.

Question	Answer / evidence
Who is our lead planner?	
Who attends regular meetings?	
Who works the wedding day?	
How many assistants are included?	
What are assistant service hours?	
What else is the team managing around our date?	
Is there a backup lead?	
How are substitutions handled?	
Any other event the same weekend?	
What happens if staffing needs increase?	

CAPACITY RESULT

☐ Clear and credible ☐ Needs detail ☐ Team / availability risk

Test the Working System You Will Live With for Months

Good fit is not constant contact; it is a communication process that is clear, realistic, and consistent with the service you are buying.

Communication element	Planner process	Works for us?	Clarify
Primary channel			
Response expectations			
Meeting cadence			
Portal / project system			
Shared email / access			
After-hours policy			
Who answers routine questions?			
Who approves budget changes?			
Escalation process			

WORKING FIT

Could we realistically work this way for months? ☐ Yes ☐ Maybe ☐ No

Test How the Planner Manages Recommendations and Money

The planner should make vendor and budget decisions easier to understand, not create a black box around them.

VENDOR RECOMMENDATION PROCESS

- ☐ Preferred vendor list?
- ☐ Can we bring our own vendors?
- ☐ Any referral / commission relationships?
- ☐ Who requests proposals?
- ☐ Who compares scope?
- ☐ Who tracks contracts?
- ☐ Who communicates after booking?
- ☐ Who approves vendor changes?

BUDGET PROCESS TEST

- ☐ Who maintains the budget?
- ☐ How often is it updated?
- ☐ How are commitments tracked?
- ☐ How are tradeoffs shown?
- ☐ How are scope changes reflected?
- ☐ How can the planner fee change?
- ☐ How are add-ons approved?
- ☐ What is outside budget support?

PROCESS FIT

Which process feels more transparent and easier to audit later? _____

Check the Planner Relationship Before Signing

This is not a full legal review. It is a planner-specific operating check so the written agreement matches the service you believe you are hiring.

Planner-specific term	Clear	Clarify	Notes
Service start / end			
Responsibilities / exclusions			
Meetings / communication			
Wedding-day hours			
Rehearsal coverage			
Assistants / staffing			
Design scope			
Vendor sourcing			
Travel / additional events			
Cancellation / postponement			
Replacement planner			
Overtime / extra hours			
Scope upgrades / add-ons			

SIGNING STATUS

☐ Ready to sign ☐ Clarification needed ☐ Scope does not match our needs

Verify the Working Experience, Not Just the Sales Experience

References and red flags help test whether the process described in consultation is how the service actually feels once planning begins.

REFERENCE QUESTIONS

- ☐ Did the planner stay organized?
- ☐ Were expectations accurate?
- ☐ Was communication consistent?
- ☐ Was the budget process useful?
- ☐ How were problems handled?
- ☐ Who worked the wedding day?
- ☐ Anything unexpectedly outside scope?

RED FLAG REVIEW

- ☐ Vague scope
- ☐ Unclear team / capacity
- ☐ Unclear communication
- ☐ Promises missing from proposal
- ☐ Unclear add-on pricing
- ☐ Pressure to sign
- ☐ No replacement plan
- ☐ Vague vendor relationships
- ☐ Unclear budget method

WHAT WOULD MAKE US WALK AWAY?

Choose the Planner or Service for Working Fit

Connect service fit, process, scope clarity, team, capacity, communication, price-to-scope, and contract - not chemistry or portfolio alone.

Criterion	Finalist A	Finalist B	Finalist C
Service fit			
Process fit			
Scope clarity			
Team / capacity			
Communication			
Price-to-scope			
Contract clarity			
Confidence			

FINAL HIRING RECORD

Planner chosen: _____ Service level: _____

What they own: _____

What we still own: _____

Service start: _____ Current fee: _____

Why this is the right fit: _____

Planner Selection Notes

Use this space for consultation follow-ups, proposal questions, contract clarifications, and any decision that still needs a clear owner.