

FREE PLANNING WORKBOOK

Wedding Vendor Selection, Booking & Contract Workbook

Define the vendor team your wedding actually needs, prioritize bookings, compare consultations, and review the operational terms before signing.

DEFINE • PRIORITIZE • COMPARE • VERIFY

Choose the Vendor Team Before You Start Booking

Use this workbook for decisions through contract signing. Once a vendor is booked, move live status, payment dates, contacts, documents, and follow-up actions into your vendor tracker.

1 DEFINE

Start with the wedding format, venue inclusions, and services the event truly requires.

2 PRIORITIZE

Use scarcity and dependency to decide which categories deserve attention first.

3 VERIFY

Compare scope and make sure material promises survive into the written agreement.

CORE RULE

The right vendor team is not the longest list. It is the smallest complete team that covers the event you are actually planning.

WORKBOOK BASELINE

Wedding date: _____ Venue / location: _____

Approx. guest count: _____ Wedding format: _____

Top experience priorities: _____

Define the Wedding Before the Vendor List

Clear inputs produce clearer quotes. Record the operational facts vendors will use to scope the work.

Planning input	Current answer	Confirmed?	What is still unknown?
Wedding date			
Ceremony location			
Reception location			
Guest-count range			
Meal / service style			
Number of locations			
Planning support			
Major experience priorities			

FOUR QUESTIONS TO ANSWER FIRST

What does the venue already include? · What must happen for the event to function?
Which experiences matter most? · Which services depend on earlier decisions?

Build the Vendor List Around the Event

Mark a category as required only when the format, venue, legal ceremony, food plan, logistics, or experience priorities call for it.

Vendor category	Included elsewhere?	Required	Priority	Optional	Not needed
Venue					
Planner / coordinator					
Catering					
Bar / beverage					
Photography					
Videography					
Florist					
DJ / band / music					
Rentals					
Cake / dessert					
Officiant					
Hair / makeup					
Transportation					
Stationery					
Lighting					
Photo booth / specialty					

Avoid Paying Twice for the Same Responsibility

Before adding a vendor, confirm whether the venue or another agreement already owns the job.

Responsibility	Already included by	Need another vendor?	Reason / gap
Tables / chairs			
Linens / tabletop			
Bar staffing			
Catering staffing			
Setup / breakdown			
Lighting / power			
Sound / AV			
Coordination			
Transportation			
Cake cutting / dessert service			
Cleanup / strike			

OVERLAP CHECK

If a second vendor is still needed, define the exact gap in scope before requesting a quote.

Map What Each Vendor Needs Before They Can Quote Well

Research can begin early, but final scope should not pretend certainty that the wedding does not yet have.

Vendor	Depends on	Unlocks	Research now?	Book now?
Venue	Budget, guest range, location	Most downstream vendors		
Photo / video	Date, venue, coverage priorities	Visual timeline		
Catering	Venue, service style, guest range	Menu, staffing, rentals		
Florist	Venue, tables, ceremony setup	Installation plan		
Rentals	Venue inventory, guest count, floor plan	Physical setup		
Transportation	Locations, guest count, timeline	Movement plan		
Cake	Guest count, service plan, venue logistics	Dessert service		
Beauty	Getting-ready group, location, photo start	Morning timeline		

DEPENDENCY RULE

Separate early research from a final commitment when key scope inputs are still unknown.

Set Booking Priority With Two Scores

Scarcity measures how quickly the right provider may disappear. Dependency measures how much other planning waits on the decision.

Vendor	Scarcity L/M/H	Dependency L/M/H	Date-sensitive?	Blocks a decision?	Priority

PRIORITY INTERPRETATION

High scarcity + high dependency = act first. High scarcity + low dependency = protect availability.
Low scarcity + high dependency = define the information soon. Low + low = keep later.

Build a Personalized Booking Sequence

Sequence matters more than trying to book every category at once. Local availability, priorities, and wedding complexity should control the order.

FOUNDATION VENDORS

Venue and, if desired, full-service planning support. These choices define what the wedding can physically and operationally support.

HIGH-SCARCITY VENDORS

Protect one-date teams that matter most to you and may disappear quickly in your market.

DEPENDENCY-HEAVY VENDORS

Scope rentals, florals, transportation, cake, beauty, and related categories after their key inputs become clear.

OUR NEXT THREE BOOKINGS

1. _____ 2. _____ 3. _____

Turn the Sequence Into Your Booking Timeline

Treat these as planning ranges, not universal deadlines. Popular dates, local conditions, complexity, and a specific preferred vendor may move a category earlier.

Vendor	Reference range	Our target	Depends on	Research	Contact	Booked
Venue	Often 12-18 mo					
Planner	Often 12-18 mo					
Photo / video	Often 9-15 mo					
Catering	Often 9-12 mo					
Music	Often 8-12 mo					
Florist	Often 6-10 mo					
Rentals	Often 6-9 mo					
Beauty	Often 6-9 mo					
Cake / transport / officiant	Varies by scope					

Re-Rank Remaining Vendors if You Are Booking Late

Work from current availability, current dependencies, and the simplest scope that still protects the core experience.

Vendor	Blocks a decision?	Date-sensitive?	What can simplify?	Availability now	Next action

LATE-BOOKING PRIORITY

- 1. Book anything that blocks another decision.
- 2. Secure date-sensitive people next.
- 3. Simplify scope where necessary.
- 4. Ask what is actually available now.

Prepare the Inputs Before the Vendor Call

Consultations are more useful when every vendor responds to the same event facts and service assumptions.

Wedding date

Venue / location

Approx. guest count

Service window

Event format

Specific job expected

Venue restrictions

Insurance requirements

Access / load-in details

Budget range, if relevant

WHAT WE NEED THIS VENDOR TO DO

WHAT IS ALREADY DECIDED VS. FLEXIBLE

Ask Questions That Reduce Unknowns

Use the same universal structure across categories, then add technical questions specific to the service.

Area	Core question	Why it matters
Availability	Are you available for the full date and service window?	Confirms commitment
Scope	What exactly is included and excluded?	Prevents assumptions
Money	What can increase the final price?	Reveals variable cost
Payment	Deposit, due dates, methods, reservation status?	Clarifies cash timing
Cancellation	What happens if we cancel or postpone?	Shows exposure
Staffing	Who will actually work the wedding?	Confirms team
Insurance	Can you meet the venue requirement?	Avoids compliance issues
Logistics	Setup, travel, access, delivery, breakdown?	Prevents friction
Overtime	Rate, increment, approval authority?	Prevents surprises
Backup	What happens if you cannot perform?	Clarifies failure process

Compare Vendors on the Same Criteria

A lower quote is not automatically the stronger fit. Compare scope, variables, who performs the work, and how clearly the agreement is documented.

Criteria	Vendor A	Vendor B	Vendor C
Availability			
Scope fit			
Deliverables			
Price clarity			
Variable fees			
Communication			
Staffing / lead			
Logistics			
Backup process			
Contract clarity			
Overall fit			

SHORTLIST DECISION

Best fit: _____ Biggest unresolved issue: _____

Move Important Verbal Answers Into the Written Record

If an answer materially affects why you are booking, compare what was said with the proposal and contract.

Important answer	Vendor said	Proposal says	Contract says	Resolved?

FOLLOW-UP RULE

If a material promise is missing, request written clarification or an updated document before treating it as settled.

Review the Agreement in Three Passes

This is an operational review, not individualized legal advice. Consider qualified legal review when language is unclear or carries significant legal or financial consequences.

PASS 1 • EVENT FACTS

Verify the parties, date, locations, service times, guest-count assumptions, and vendor identity.

PASS 2 • MONEY & SCOPE

Verify services, deliverables, payments, fees, overtime, travel, exclusions, and anything that can change the total.

PASS 3 • CHANGES & FAILURE POINTS

Review cancellation, postponement, force majeure, substitutions, amendments, and what happens if either side cannot perform.

OUR STATUS

☐ Clear to continue ☐ Needs vendor clarification ☐ Needs professional review

Separate What the Vendor Does From What You Receive

Scope describes the work. Deliverables describe tangible or defined outputs. Both should be clear enough to verify.

SCOPE · WHAT THE VENDOR DOES

DELIVERABLES · WHAT YOU RECEIVE

EXCLUSIONS / ASSUMPTIONS

Anything the proposal assumes the venue, couple, or another vendor will provide:

Map the Full Cost Exposure Before Signing

Do not compare only the headline package price. Record every fee or condition that can change what you ultimately pay.

Cost element	Included?	Amount / rate	What triggers it?	Confirmed in writing?
Base price				
Tax				
Service charge				
Gratuity included?				
Staffing				
Delivery / setup / breakdown				
Travel / mileage / parking / lodging				
Rentals / equipment				
Overtime				
Card / payment fee				
Guest-count / quantity adjustment				
Other variable cost				

Review Cancellation, Postponement, Substitution & Overtime Separately

Do not assume these policies are interchangeable. Record what each part of the agreement actually controls.

CANCELLATION / POSTPONEMENT

- ☐ What triggers cancellation?
- ☐ What happens to money already paid?
- ☐ Can funds transfer to a new date?
- ☐ What are rebooking limitations?
- ☐ What notice is required?

SUBSTITUTION / BACKUP

- ☐ Is the named person guaranteed?
- ☐ Who may substitute?
- ☐ What notice is required?
- ☐ Is couple approval required?
- ☐ What replacement / refund process applies?

OVERTIME / CHANGE RULES

Overtime rate / billing increment: _____

Who can authorize extra time: _____

Latest authorization time: _____

Required written approval / amendment: _____

Run the Final Operational Review Before Signing

Every checked item should be understandable in the current agreement, incorporated proposal, or written clarification.

- | | |
|---|---|
| ☐ Correct parties / vendor entity | ☐ Correct date and locations |
| ☐ Service window is correct | ☐ Scope matches expectation |
| ☐ Deliverables are clear | ☐ Exclusions are clear |
| ☐ Payment schedule understood | ☐ Variable fees understood |
| ☐ Cancellation understood | ☐ Postponement understood |
| ☐ Force majeure located and reviewed | ☐ Substitution / backup understood |
| ☐ Overtime rules understood | ☐ Travel / access rules understood |
| ☐ Material promises are written | |

DECISION

[] SIGN [] CLARIFY FIRST [] DO NOT SIGN YET

Main unresolved issue: _____

Move the Booked Vendor Into the Live Tracking System

This workbook captures the decision. The vendor tracker becomes the live record for status, contacts, contracts, deposits, balances, due dates, and next actions.

- | | |
|--|---|
| ☐ Vendor entered in tracker | ☐ Status updated to booked / contracted |
| ☐ Contract saved in secure folder | ☐ Total contracted cost entered |
| ☐ Deposit entered | ☐ All payment dates entered |
| ☐ Lead contact entered | ☐ Insurance / venue requirement recorded |
| ☐ Next action recorded | ☐ Current proposal / amendment saved |

HANDOFF RULE

Once booked, do not maintain a second live payment or status record in this PDF. Use the tracker and budget/payment system as the source of truth.

TRACKER LOCATION

File / system: _____ Owner: _____
Last updated: _____

Use this space for unanswered questions, contract clarifications, consultation follow-ups, and decisions that still need to be transferred to the live vendor tracker.