BANQUET EVENT ORDER (BEO)

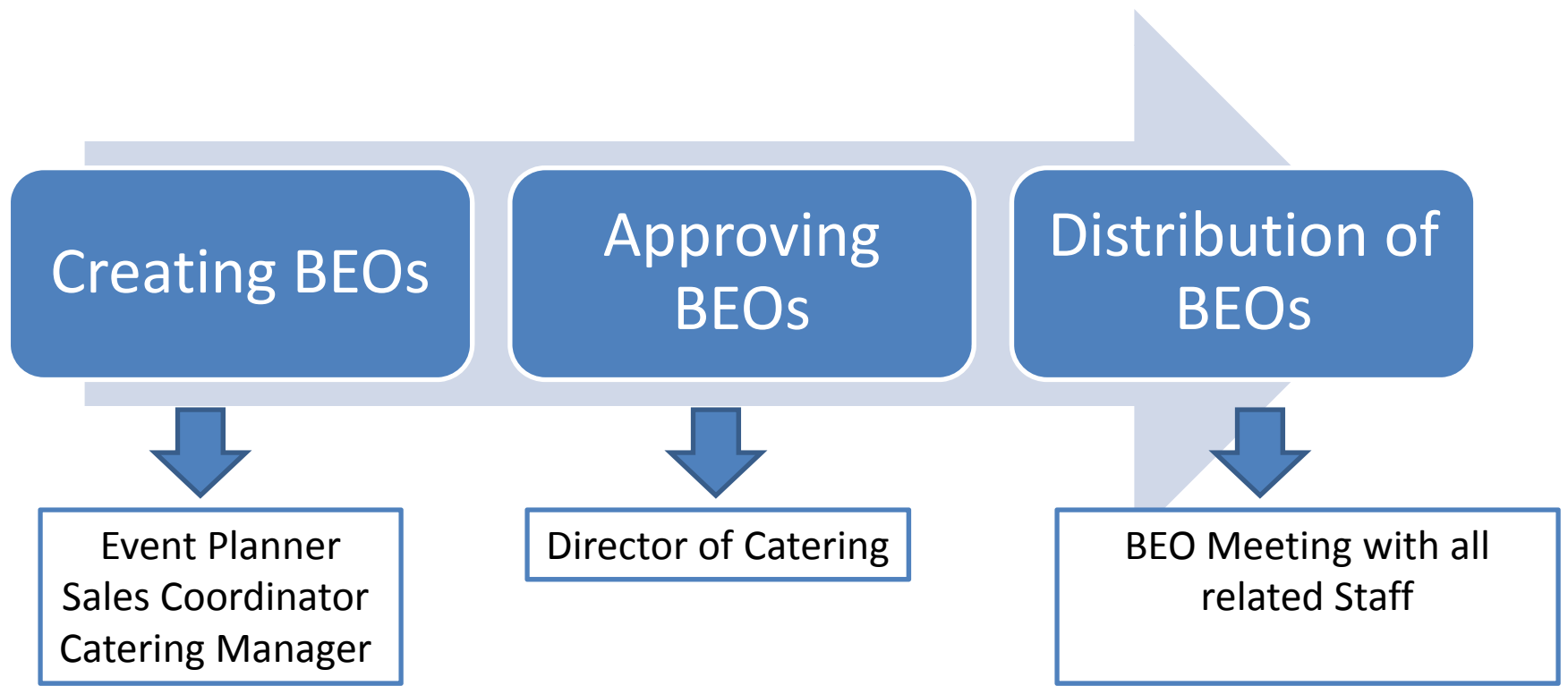| Creating BEOs	Approving BEOs	Distribution of BEOs
Event Planner Sales Coordinator Catering Manager	Director of Catering	BEO Meeting with all related Staff

What is a BANQUET EVENT ORDER (BEO)

- Banquet Event Order (BEO) is a contractual agreement, which expresses the objectives and details of a function between the guest(s) and the club or the Catering facility.

- A banquet event order is a document usually prepared by an event planner or the Catering Manager in a club or catering facility. The form includes all the specifics of the event in very intricate detail. The form will evolve and change during the planning stages and even down to the day of the event. Information included on the form needs to be as accurate as possible to ensure the best results.

- **Banquet Event Order is included following information:**
    - Function Day / Date of Scheduled Function
    - Starting time / Ending time
    - Group Name / Guest's Name
    - Customer Code (Market Segments)
    - Contact Information : Address, Phone Number, E-mail address
    - Function Type
    - Location
    - Expected Attendance
    - Guaranteed : The number of guests confirmed.
    - Menu Requirements
    - Bar Requirements
    - Set-Up and Arrangements
    - Other Revenue
    - Special Instruction if necessary.

NECESSARY STEPS and PROCEDURES

1. Preparation
   a. Format: All BEOs should provide the same essential information with the objective, layout, space allowed for information, etc.

   b. Timing: BEOs should not be prepared more than thirty days in advance of a function. Depending on the type of function, size, special arrangement, etc., they may be prepared and distributed anywhere from 10 – 30 days in advance.

   c. Responsibilities
      - The sales associate to whom the function is assigned has the responsibility for gathering all of the information necessary to write the BEO and must approve and initial the BEO before it goes to the Catering Manager.
      - Catering Manager will approve BEOs prior to their distribution. Special attention should be paid to any conflicts, food and wine pairing, service times and overall financial yield management for the event.

How to Write BEOs

1. Fill out all information.   If there is more than one contact, list all names.
2. Ensure that the correct guarantee / set numbers are in place.
3. Clearly state the Customer's Objective. This allows the meeting planner to know that the goal of their event or function is understood.
4. Accurately identify starting and ending times.
5. The timing for each separate part of the program should be indicated, e.g., reception, dinner, dance, program, invocation, etc.
6. Information of the set-up should be clear and specific. Specify table, stage and dance floor, size and color of lines. If piano or other large equipment is needed, specify location. It should be standard practice to attach diagrams to the BEO for every function, regardless of its size.
7. Under food or "Menu" section,
    ❖ Menu items should be listed in the order they are served. Information description of each items is highly recommended so that the custom will know exactly what will be served, and the food production staff will know exactly what the guest expects to be served.
    ❖ Indicate the approximated entrée serving time or an agree upon time-line which has been discussed with the customer.
8. Under Beverage Service, specify the type of service (e.g., hosted, open, cash, self-serve, butler).
    ❖ Hosted / open or Cash Bar: list the number of bars required, number of cashiers and bartenders needed.
    ❖ Butler Service: indicate the number of butlers according to staffing standards.
    ❖ Indicate the type of beverage which should be available.
    ❖ Indicate any special requests from guests.
9. Be sure to list all equipment or other types of items (such as flowers, lines, chair covers, etc.) which the facility is to order. Be specific on each item and ensure that the correct price is listed on BEO
10. Any special services required of the facility's other departments should be detailed, along with specific charges – i.e., electrical power, telephone, audio visual, shipping and receiving.
11. All package or inclusive pricing should indicate an internal break-down of charges for accounting purposes.

Market Segments

- Detailed market segments are identified in individual Garrison Marketing Plans.

- Segmentation is the process of dividing basic demographics into specific groups (or segments) that are likely to need specific products, programs, and services.

- Once an entire population is broken into market segments, a particular business' most promising segments are known as target markets.

- EventMaster can be set up to automatically issue a Customer Code by enabling the Maintenance/Site Information / Defaults Button / Other Options tab / Auto-Generate Customer Code Check Box.

  - This code identifies the customer and is used for tracking the customer's bookings.
  - Sample Customer type and Sales type are below:

Customer Type:	Sales Type
A = Active Army	B = Business
C = Civilian	C = Command
D = DoD Civilian	E = Ethnic - Based
F = Military Family	F = Fraternal - Based
G = Reserve / Guard	M = Other Military
M = Active Other	O = Other
R = Retirees	P = Private
	R = Religion – Based
	S = Sports – Based
	W = Wedding
	X = Off-premise
	Y = Youth - Based

Distribution of BEOs

1. To Whom
   - ❖ The specific distribution should be established by each club, based on their size, organization, etc. It is important that all catering sales managers receive a copy of each BEO to include in their 30 day file. This helps immensely in coordinating short-time menu planning.

2. Responsibility for Reading
   - ❖ All recipients of the BEOs should review them immediately upon receiving, to identify unusual and special arrangements well in advance of the function. Any questions about understanding the BEO should be directed to its author as soon as possible.

3. The "Board"
   - ❖ The "Board" should be located in or near the banquet captain's office. There should be seven clipboards (one for each day) upon which all BEOs, convention programs and guarantee slips are posted.
   - ❖ As changes occur, they should be noted on these copies by the person making the change, including, his/her initials, the time and date.

➢ A sample **Banquet Event Order is included on the following page.**

BANQUET EVENT ORDER

DATE: _____ POSTING: _____

CONTACT: _____ FUNCTION: _____

ADDRESS: _____ LOCATION: _____

PHONE: _____

EXPECTED ATTENDANCE: _____

MENU REQUIREMENTS   **+BAR REQUIREMENTS**

$_____per guest $_____per guest

WINES _____ $_____**per guest**

_____

SET-UP AND ARRANGEMENTS

                                                              $_____costs

_____

TOTAL AMOUNT DUE: _____

FINAL PAYMENT DUE: _____

DEPOSIT REQUIRED: _____ DATE RECEIVED: _____

DATE DEPOSIT RECEIVED: _____ RECEIVED BY: _____

PHONE: _____FAX: _____

Banquet / Event Change Order

1. Change information is categorized in two ways:
   - Changes to revenue – these include price increases, guarantee revisions, additional items added to menu, extra hours of open bar, etc.
   - Set-Up / Logistical Changes – meeting room set up, time change, cancel one break out room, etc.

2. Changes in any detail of an event may occur at any time throughout the sales cycle.
   - ❖ All changes should be expedited quickly.
   - ❖ When changes occur, a written change order **MUST BE COMPLETED AND DISTRIBUTED**.
   - ❖ This form properly identifies the change and documents communication to all departments affected by it.
   - ❖ Distribution: Manager, Chef, Staff, Client file, etc.
   - ❖ If there are multiple changes, each new change form should be attached on top of the prior one.   It is more easily identified if it is on a different color paper than the Banquet Event Order.

3. Use the ***Banquet / Event Change*** to notify all personnel of guarantee numbers as quickly as they are received.

4. **Last Minute Changes:**
   - ❖ All last minute changes should be noted on the copies of the BEO itself by the person making the change. These changes should be initialed, timed and dated.

- A sample of a ***Banquet/Event Change Order*** is shown on the following page.

ATTENTION

BANQUET/EVENT CHANGE

Function Title _____**Date**_____

Room Scheduled_____

Directions

_____

_____

_____

_____

Authorized By_____


BEO Meeting

Daily BEO Meeting

- Each day the Catering Manager conducts a meeting in his/her office or another convenient location to go over all of the details of each BEO. The meeting is attended by the captain, banquet chef, catering service manager, and audio visual representative.

- **As an example:**

  - ➢ On Monday , events for Monday evening and for Tuesday day functions would be discussed.
  - ➢ This procedure would follow for Tuesday, Wednesday and Thursday.
  - ➢ On Friday, weekend business for Saturday and Sunday would be discussed, and for Monday functions.

  - ➢ The meeting should be short, but needed to cover following information:
    - ➢ Guarantee / Sets
    - ➢ Changes
    - ➢ Time / Locations
    - ➢ Special Notes

Weekly BEO Meeting

- Purpose
  - The purpose of the BEO meeting is to discuss the information contained in the BEO's in order to properly plan for a successful event. The information in a BEO leads to action within numerous departments that ultimately effects the profitability of the facility. From ordering food and beverage items, to scheduling staff to set up and serve the event.

- Who need to attend:
  - The meeting time should be set as a regular weekly meeting.
  - The next 10 days of BEOs should be reviewed.
  - Attendance, at a minimum includes, the Chef, Banquet Manager, Set-up staff, Warehouse staff, and Director of Catering.

- Changes:
  - Our customers always have, and always will, make changes to their events. **Our goal of getting information in advance of the event**, causes us to have to manager many changes that occurs before the event begins. **How we manage change information is the key to an accurate banquet check, and ultimately a profitable Banquet and Catering Department.**
  - Change information should be treated differently based on when it is received compared to when the event occurs. The following chart illustrates the appropriate resources to communicate change, based on this priority.

ADD-ON

- A function is booked within ten days of the function date and is entered into the system late.
- It requires top priority.
- The salesperson should attempt to sell the add-on client <u>a menu already being served at the facility on that day.</u>
- The salesperson must notify the banquet captain at the facility as soon as space is booked for the event.
- The **Daily Event Schedule** for that day must reflect the add-on.

  ➢ Because add-on's are not always possible, any un-booked meeting space which may have been given away as free space after the distribution of the weekly contracts must be blocked and the catering office notified.

  ➢ If this granting of space is not communicated, and an add-on occurs, a double booking may result.
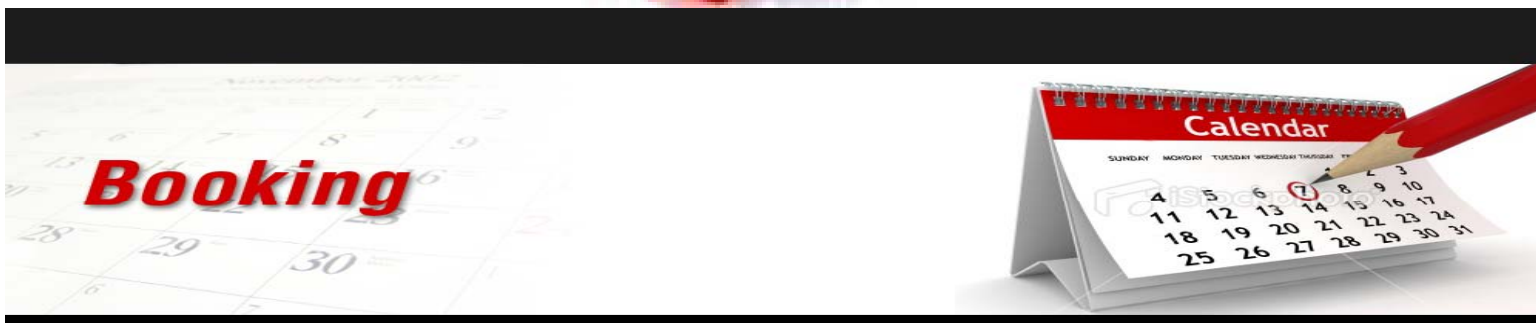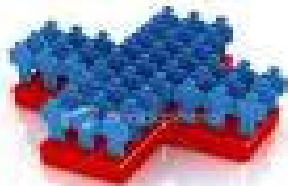
GUARANTEES

- An effective guarantee system must be used in order to control labor hours, food cost, and waste. To be effective, the system must be enforceable.

- In the Catering Policies Statement, the in-house policy for Guarantees must be stated.

- The way each facility operates determines how guarantee numbers are collected and disseminated.
  - Each sales manager may collect their own numbers by contracting the client 48 hours out.

    OR

  - The secretary may call.

- It is the client's responsibility to supply the guarantees, each sales person should take the responsibility for obtaining guarantee numbers.

- If there are changes within 48 hours of the event, the salesperson must check with the Catering Manager, Chef, and Banquet Captain before communicating that it is okay to the client.

- Not all F&B events require a guarantee. All events with a standard menu require a guarantee. Events that are based on fixed Quantities are not tied to a guarantee.
  - Examples are: 200 Shrimp / 3 dozen cookies / 2 bottle of hours white wine at each table etc.

The price per person will be based on the guarantee number or the actual number of people served, whichever is higher.

Other Revenue

- There is significant revenue associated with the category of "Other revenue". The BEO – "Special Instructions and Arrangements" is designated to include such information.

- In the EventMaster, you can add "Outside Services" and "Vendor" information within "Event Information" and "Maintenance" field.

  - Outside Services
    - Outside Services are services, tasks, or functions that are needed for your event and require you to hire an outside provider. For example, limousine service, band, bag pipes, photographer, fireworks, and valet parking attendants.
    - Within the Event Information screen, select the *Event Details / Outside Service menu*

  - Vendors
    - Use the Vendor Maintenance to add, update, or remove vendors. Vendors are lists of business that rent or sell you materials and services.
    - To easily view your vendor information, click the <PRINT> button within the Vendor Maintenance screen. The Vendor Listing report displays.
    - Within the Maintenance screen, select the *Vendors* menu option.

Other Revenue

- The following list includes the types of other revenues that should appear in this section of the BEO.

Department	Revenue Type	How to Communicate
IT (IM)	• Phones and Phone Lines • High Speed Internet	• Telephone order • Request via e-mail.
Labor Fees	• General Labor Fees • Buffet Minimums • Bartender Fee • Cashiers Fee • Pre-Set Fee • Carver Fee • Ice Sculptures • Set up Change Fee • Coat Check • Corkage Fees	• To be included on the BEO, in the Special Instructions and Arrangements section.
Rental Items	• Piano, Tables / Chairs, China, • Linen/Napkins • Transportation, Lift Trucks etc.	• Third Party Vendors
Sundry Items	• Flowers, Centerpieces, Props, Cakes etc.	• Third Party Vendors

Client Pre-Function Review

- The sales person should check with the client and conduct a detailed pre-function review, going over all the details of the function, discussing even the minor points and having the customer sign off on each decision made.

- If changes are made, a Change Order Form should be completed and distributed appropriately.

Monitoring The Function

- Normally, the Sales person who works with the client during the sales cycle will monitor the function. If this is not possible, the Catering Manager must be notified and someone else assigned to be present.

- Failure to have a sales representative monitoring the function signals the customer that your organization is much more interested in selling the event that making certain it succeeds.

- Lack of monitoring weakens the evaluation and follow-up activities.

- **It is always important to see an event from the initial booking to the final product.**

Sales Office Function Follow-UP

1. **Post Function Report**

- The **Post Function Report** is prepared by the **Banquet Captain on duty after the banquet check is completed.**

- The form requests information which will be very useful in creating a record for the master account file; made up of objective data and subjective impressions of the function

- The comments in the **NOTES** section should be candid and provide information which will improve banquet or other catering function.
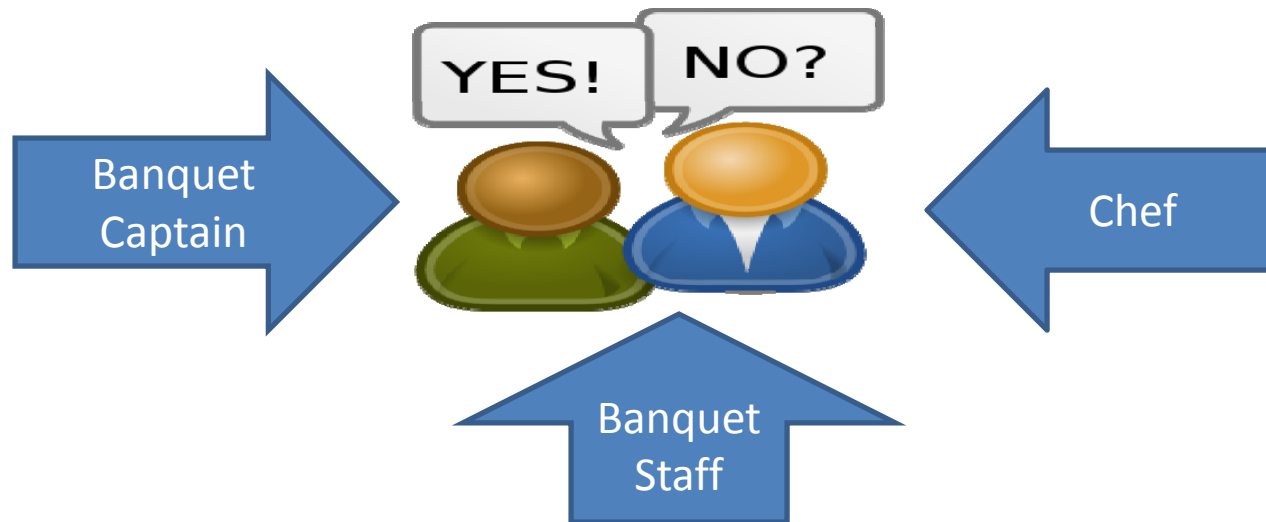
- A copy of the Post Function Report is shown as following page.

Post Function Report

Organization _____ Date _____

Type of Function _____ Room _____

Guaranteed Number _____ Actual Number _____

Scheduled Start of Meal _____ Actual Start of Meal _____

Banquet Captain / Manager _____ Actual End Meal Time _____

Food Server _____

Bartender _____

NOTES

Room Set-Up _____

Food _____

Beverage _____

Other _____

_____

_____

_____

CC: - Catering, Facility Manager, Kitchen   Prepared By :

        _____

2. Checklist for Successful Events

Before the Event

- ✓ All requirement of client obtained (use professional sales process, clear language, complete sales kit.)
- ✓ Plans in place to graciously host meeting planners when site inspections are done.
- ✓ Event space assigned in function book (one person authorized to make entries; space assigned appropriate to group size).
- ✓ Details confirmed with client through booking arrangement.
- ✓ Written communications of details directed to key staff members using functions sheets, change notices, weekly, and daily listing of functions.
- ✓ Entries made on daily schedule of furnishings and equipment usage.
- ✓ Staff meeting conducted with key personnel.
- ✓ Procedures in place to handle pre-shipped materials, messages, duplicating requests.
- ✓ Adequate scheduling of staff to service meeting.
- ✓ Client consulted prior to meeting to ensure all arrangements are OK.

Day of Event

- ✓ System in place for communicating to service staff the schedule of tasks to be performed.
- ✓ Salesperson or coordinator scheduled to greet client's representative on arrival, to give information packet, to show meeting room, and to conduct brief orientation of property.
- ✓ Salesperson or coordinator scheduled to check on client's representative during the day.

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2. Checklist for Successful Events

After the Event
- ✓ Client's representative provided with written critique form.
- ✓ Completed critique retrieved; used to improve services and to follow up with phone call to client.
- ✓ Client thanked in writing.

On-Going
- ✓ Training to develop a skilled, service-oriented staff.
- ✓ Staff members that make events successful thanked or rewarded.
- ✓ Conditions of furnishing, risers, skirting, tablecloths, and tableware checked.
- ✓ Varied and enticing food and beverage offerings developed.
- ✓ Polices and procedures for providing extensive A/V services.
- ✓ Physical features refurbished to address client's needs.