Day Before Event

In this section we will discuss things you must do on the day before an event. This includes building rosters for clients and communications

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Building the Roster

- On some events a roster must be sent to the client, and to our Roster Manager or Captain.
    - All Corporate Staffing Partner events get a roster. These are due by noon the day before the event.
        - If there are any changes after you send the roster, you must send a new one
    - Sometimes an order will come from a private event client that requires a roster. There will be a note in the order to let you know. To build the roster follow these instructions:
        - Go to event page
        - Locate the "Reports" drop down menu on the far right in the event page
        - Select "Export booked"
        - Open the file
        - Select Yes
        - When the file opens, click "Enable Editing" at the top of the page.
        - In row 3, column C highlight "-Participants list"
            - Un-bold this text
            - While still highlighted, reduce the text size to 9
        - Go to row 1, column C and click in the box
            - Highlight the shift details (Only the info in parentheses)
            - While highlighted push control and X to cut the info.
        - Go to cell C8 and hit control and V at the same time to paste the shift details.
        - Go to the top of the page where column C and D meet and click in the space labeled C
        - Hover over the small vertical line in between the two columns until you see a symbol that looks like a cross with two arrows pointing away from each other.
        - Left Click and hold while dragging your mouse to the left.
            - This shrinks the column width
                - Shrink to a size of 19 and release the mouse button
        - Move your cursor to the far left of row one and left click where it has the number 1
        - Move your cursor to hover over the small horizontal line in between the 1 and 2 until you see the same cross symbol from before.
        - Left click and drag down.
            - This is increasing the size of row one.
                - Increase to a size that allows you to see all of the information in cell C1.
                    - Do not release the mouse button until you can see all of the contents of the cell.
                    - Do not leave a bunch of extra empty space. Only increase the row size to the minimum size necessary.
        - Repeat the above steps for rows 2 and 3.
        - Click in cell C8 and go to the menu option to border the cell.
            - Use the "All borders" option
        - Left click in cell A9 and drag your mouse down and to the right until you have highlighted all cells with information in them
            - While highlighted, go to the menu and apply "All Borders" to the cells.
        - Go to cell B9 and work your way down the column to check all information

- On the rosters, we only need the first name and no HR symbols
    - If there are any symbols or codes, remove them and leave the first name only

- Go to cell C9 and work your way down the column to check all information
  - On the rosters, we only need the last name and no HR symbols
  - If there are any symbols or codes, remove them and leave the last name only
- Go to cell D9 and work your way down the column to check all information
  - The title “Email” needs to be changed to “Position”
    - Work your way down the column and change each email address to the correct position the corresponding staff member will be working. I.e.) Bartender, Server, Parking Attendant, etc.
- Once completed, go to the top of column D and reduce the size to the minimum size to allow all information to be visible in the column.
- Highlight columns E,G, and H by clicking on the “E” at the top of the column,, then holding the Control button on the keyboard, and clicking on the G and H at the top of the columns.
    - Once selected, right click and delete all 3 columns.
- The column that is labeled “E” now will have a title of “Shift”
    - In the cells that have the shift description, only the time and position is important.
      - Delete all information except the time.
        - I.e.) 7:45am-2:45pm
- Once completed, go to the top of column E and reduce the size to the minimum size to allow all information to be visible in the column.
- Click at the top of column F and drag right to increase the size of the column to size 15 or so.
- Now you need to increase the size of each staff line to allow for writing info into the time entry and note boxes at the event.
  - Left click on the first row that has a staff member’s name.
  - Click and hold the shift key on the keyboard and drag your mouse down until all rows with staff members have been highlighted
  - Once highlighted, move your cursor over to any of the small horizontal lines in between any two rows that are highlighted until your cursor turns into the cross symbol with arrows pointing up and down.
  - When you see this cross, left click and drag your mouse down to increase all highlighted rows to the same height and the same time.
    - Increase to a size of 27 or so.
      - The idea is to fit the roster on one page when printed in landscape mode. You will need to adjust the height and width of all rows and columns accordingly depending on the number of staff. The sizes above are just a suggestion.
- Right click in the tab at the bottom of page where it says “eventParticipants-date”.
  - Select “Rename” and type what you want to rename it to.
    - Private event format- 10.21.21 Jane Doe Roster
    - Corporate event format- WKC 10.21.21 Dallas Roster
  - You can only put a certain number of characters in this tab so use your judgement on what to name it. This is not critical.

- Save the roster using the same format discussed before.
    - CP 1.2.20 Downtown 80202 Roster
    - 1.2.20 Jane Smith Aurora 80019 Roster

- Change the Orientation of the spreadsheet to Landscape
    - At the top of the page, select "Page Layout"
    - Select "Orientation"
    - Select "Landscape"
- Email to client, Roster Manager or Captain, and BCC David

- **Communication**
    - The day before the event you need to communicate with staff and the client
        - Staff
            - On solo events or events without Captains or Roster Managers you will need to reach out to staff to ensure they are ready to go.
                - First, you will push a reconfirmation.
                    - After processing the reconfirmation, keep an eye on the green check marks and reach out to any staff who are slow to complete the process
                        - After a few hours, if there are staff who have not completed the re-confirmation, you will need to text them to remind them to do so. USE THE TEMPLATE IN ZINGLE.

                          Hello {first_name},

                          Don't forget to do the day before reconfirmation of your shift tomorrow. Please go in and click the confirm button in the app.

                          Thanks,
                    - Any red flags such as: slow engagement, no engagement, weird responses, questions about car issues or illness; must be handled immediately
                    - DO NOT HESITATE TO REPLACE SOMEONE
        - Captain
            - On events where you have a Captain, you need to check in with them to make sure that they are good to go
                - Captain needs to communicate with the client directly
                    - When a Captain is booked, the client may request communication earlier and more frequently
                - Captain needs to relay any new information from the client
                - Double check that they have Captain permissions in the app
                - Verify address and timing
                - Double check that they have Captain permissions in the app
                - Have them reach out to the other staff on the event and let you know if there are any people not engaging
                - Make sure that they received the roster and understand the process

- Roster Manager
  - On events where you have a Roster Manager you need to check in with them to make sure that they are good to go
    - They do not contact the client.
    - Double check that they have Captain permissions in the app
    - Have them reach out to the other staff on the event and let you know if there are any people not engaging
    - Make sure that they received the roster and understand the process
- Once all staff have re-confirmed, then you can move on to client communication.
    - You do not want to communicate with the client first because there could be a staffing change if someone is not being responsive.

- Client
  - Text the client to do a final check in and make sure all details are still correct.
    - Double check to make sure you have specific parking and entrance instructions for the staff if applicable
    - Give them the names of the staff if requested, otherwise just use a general check in. TEXT IN ZINGLE IF YOU HAVE THEIR CELL PHONE. OTHERWISE, SEND AN EMAIL.
      - Hi {first_name},

        We are all set for your event tomorrow. Your staff will arrive at (INSERT TIME), ready to go.

        Thanks,
    - If the client provides any specific event details or information, make sure the Captain, RM, and/or the staff all get the information right away.

- On the day before the event, it is necessary to constantly be monitoring the chats and texts for call offs and red flags. This is usually the point in the process when things get the busiest. Double check with backups and keep a constant finger on the pulse of the event status.

Make any changes you feel are necessary based upon your judgement. It is better to do it the day before than last minute