WIZE

CASE STUDY

WIZE for Event Planning

From Vendor Research to Ready-to-Use Comparisons — in Minutes

How one director used WIZE to plan young alumni events across New York and Boston — turning hours of vendor research into a structured, shareable comparison in minutes.



FEATURED

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Mark Lufkin
Director, The Hotchkiss Fund (Lakeville, CT)

What WIZE Did

- Drafted professional vendor replies with smart follow-up questions — no starting from scratch
- Organized responses from multiple venues into a structured side-by-side comparison across six dimensions
- Surfaced ranked recommendations with budget considerations and suggested next steps
- Turned hours of manual research into a ready-to-share deliverable in minutes

The Challenge

Planning an event means juggling dozens of vendor emails, comparing venues across cities, tracking prices, capacity, and logistics — all while managing everything else on your plate. Pulling that information together manually can take hours.

Step 1: Respond to Vendors Smarter

As venue and vendor emails came in, Mark pasted each one directly into WIZE with a simple prompt: "Help me respond to this email. Do you have any additional questions I should ask?" WIZE drafted a professional reply — referencing budget fit, asking the right follow-up questions, and saving Mark the mental load of starting from scratch each time.

Step 2: Collate Into a Comparison

Once Mark had gathered responses from multiple venues, he asked WIZE to organize all the information into a structured comparison — pulling every detail into one place so he could evaluate options side by side at a glance. All of it organized, consistent, and ready to share — without hours of manual copy-pasting.

Step 3: Get Recommendations

Beyond the table, WIZE surfaced key observations for each city's venue options, budget considerations based on the information provided, ranked recommendations with reasoning, and suggested next steps to move forward — giving Mark not just data, but a clear path to action.

Mark Lufkin, Director of The Hotchkiss Fund (Lakeville, CT), used WIZE to plan a young alumni event across New York and Boston. The structured comparison WIZE produced included: venue name, city, and neighborhood; space type and private dining options; guest capacity and room configurations; pricing, minimums, and fee structures; availability and booking requirements; and standout features and selling points for each location.

> ***"This is something that if I had to do this on my own would take hours to do — but it was quickly done using the platform."***

— Mark Lufkin
Director, The Hotchkiss Fund

In just a few exchanges with WIZE, Mark went from a scattered inbox of vendor emails to a polished, structured comparison he could share with his team and use to make decisions. No spreadsheets, no manual formatting, no starting from scratch.

The platform handled the heavy lifting — drafting professional replies, pulling data into a consistent format, and surfacing recommendations — so Mark could focus on the strategic decisions that actually required his judgment.

The entire process, from first vendor email to final recommendation, took minutes instead of the hours it would have required manually. And because WIZE retained context across the conversation, Mark could refine and iterate without re-explaining his needs each time.

What Else Can WIZE Do for Events?

WIZE supports your full event lifecycle — not just vendor research. From the first save-the-date to the final impact report, WIZE helps you move faster at every stage.

Pre-Event

Draft invitation emails, reminder sequences, and registration copy. Set the tone and get the word out without staring at a blank page.

Logistics

Build run-of-show timelines, speaker briefing documents, and team task lists. Keep every detail organized and every stakeholder aligned.

During the Event

Create talking points, signage copy, and program materials. Have polished content ready for every moment that matters.

Post-Event

Write thank-you notes, follow-up emails, and attendee surveys — and compile a post-event impact report to share with leadership.

Try it yourself: Open a new chat in WIZE and start with your next event project. Paste in a vendor email, a venue quote, or just describe your event — and let WIZE help you move faster. WIZE — Fundraising intelligence for the work that matters.