

Case Study: BrightWave Events Workspace (Monday.com)

Client Overview

Client: BrightWave Events

Industry: Event Management & Coordination

Role: Workflow Designer / Project Manager

Tool Used: Monday.com

BrightWave Events is an event management agency that needed a centralized digital workspace to streamline client event tracking, vendor management, and internal team coordination. The goal was to build an organized, scalable structure within **Monday.com** that would reduce communication bottlenecks and improve operational visibility.

Objective

To design and implement a **Monday.com workspace** that manages all client events, vendors, and performance dashboards — enabling the BrightWave team to track timelines, budgets, and workloads in one unified system.

My Role & Responsibilities

- Designed the **BrightWave Events Workspace** from scratch, focusing on usability and scalability.
- Structured the workspace into **three primary folders**:
 1. **Client Events**
 2. **Operations & Vendors**
 3. **Dashboards**
- Created custom automations, connected boards, and data visualization widgets for performance tracking.
- Integrated communication and notification features to enhance collaboration between planners and vendors.

Workspace Architecture

Client Events — “Event Tracker” Board

Purpose: Manage all active and upcoming client events in one place.

Key Columns:

- **Event Name** (Name)
- **Client Name** (Text)
- **Event Date** (Date)
- **Event Type** (Dropdown: Wedding, Corporate, Conference, Festival)
- **Status** (Status: Inquiry, Planning, In Progress, Completed)
- **Assigned Planner** (People)
- **Budget** (\$ Number)
- **Notes** (Long Text)

Automations Implemented:

- When *Status* changes to **Completed**, move item to group **Past Events**.
- When a new event is created, automatically notify the **Assigned Planner** via Monday.com notifications.

Impact:

Simplified project tracking for multiple concurrent events and ensured no deadlines or client handovers were missed.

Operations & Vendors — “Vendor Management” Board

Purpose: Maintain vendor database and coordinate supplier availability for each event.

Key Columns:

- **Vendor Name** (Item name)
- **Category** (Dropdown: Catering, Venue, AV, Décor, Transport)
- **Contact Person** (Text)
- **Email / Phone** (Communication fields)
- **Rating** (1–5 scale)
- **Availability** (Status: Available, Booked, Pending)

Integrations & Features:

- Linked to the **Event Tracker** using a *Connect Boards* column (allowing each event to display its assigned vendors).
- Created a **Form View** to allow new vendors to submit details directly into the system.

Impact:

Eliminated manual vendor tracking and enabled real-time coordination between event planners and service providers.

Dashboards

Purpose: Provide a centralized performance and workload overview.

Widgets Added:

- **Calendar Widget:** Displayed upcoming event dates and milestones.
- **Chart Widget:** Visualized event distribution by type (e.g., corporate vs. weddings).
- **Workload Widget:** Monitored planner capacity to prevent burnout.
- **Numbers Widget:** Tracked total events, average budget, and completion rate.
- **Table Widget:** Provided summary data for management reporting.

Impact:

Improved decision-making with instant visual insight into team performance, workload balance, and event profitability.

Results & Outcomes

Centralized hub for client and vendor coordination

Increased efficiency in event scheduling and planner workload management

Real-time visibility through dashboards and automation

Reduced manual communication and follow-ups

Scalable structure adaptable for future events or additional departments

Key Takeaways

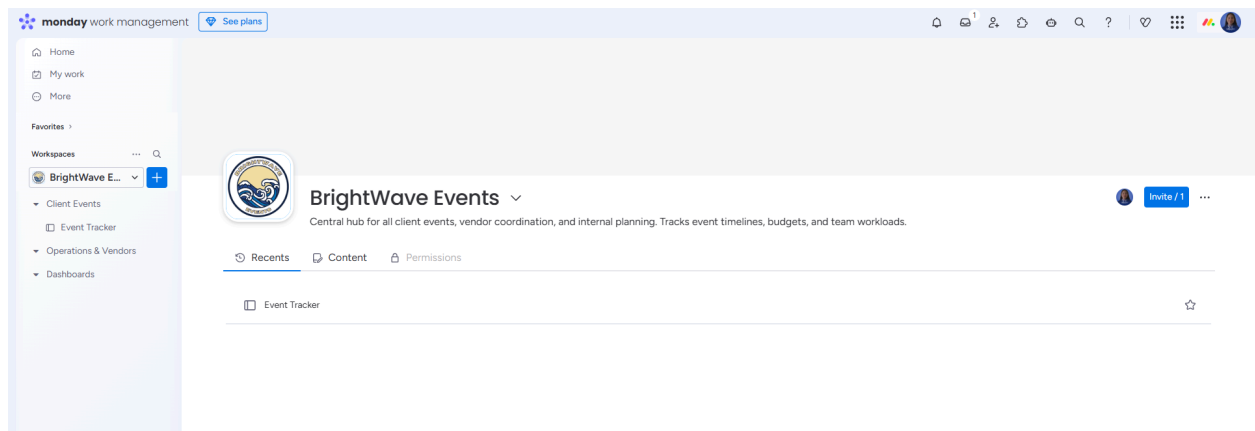
- Automation and board connectivity in Monday.com drastically reduced administrative overhead.
- Dashboard insights helped the management team allocate resources effectively.

- Custom forms enabled easy vendor onboarding without manual data entry.

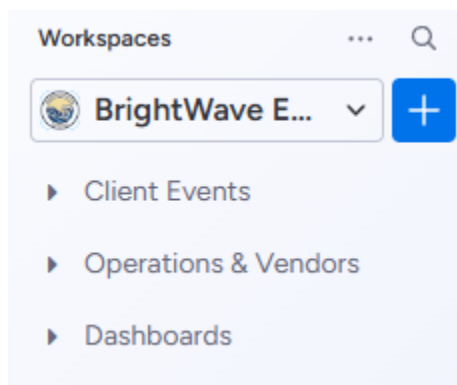
Skills Demonstrated

- Workflow & Process Design (Monday.com)
- Automation Configuration
- Dashboard & Data Visualization
- Team Workload Management
- Vendor Coordination System Design
- Digital Collaboration Setup

Workspace:



Folders:



Client Events Folder:

Board 1: Event Tracker

Event Tracker

SidekickIntegrateAutomate

Main table

New event nameSearchPersonFilterSortHideGroup by

On-Going Events

	Event name		Client Name	Event Type	Event Date	Assigned Planner	Status	Budg
☐	Ocean Gala 2025		BlueWave Beverages	Corporate	Nov 25		In Progress	45,0
☐	Mountain Wedding		John & Lila Kim	Wedding	Dec 14		Planning	60,0
☐	Tech Vision Expo		NovaTech Group	Conference	Jan 8, 2026		Inquiry	120,0
☐	Winter Lights Festival		City of Fairmont	Festival	Dec 21		Completed	90,0
☐	Charity Dinner Night		HopeForAll NGO	Corporate	Nov 30		Planning	35,0
☐	+ Add event name							
								350,0 sun

Past Events

	Event name	Client Name	Event Type	Event Date	Assigned Planner	Status	Budg
☐	+ Add event name						
							0 sun

Automation:

- When Status changes to “Completed”, move to group “Past Events”.

When Status changes to Completed

↓

Then move item to Past Events

Create automation

When Status changes to Completed move item to Past Events

Minor Updated a few seconds ago Owner Description Add description

- When a new event is created, notify the Assigned Planner.

When an item is created

↓

Then notify Juliana Mahri De Jesus

Update automation

Operations & Vendors Folder:

Board 2: Vendor Management

Vendor Management

SidekickIntegrateAutomate

Main table

New vendor nameSearchPersonFilterSortHideGroup by

New Group

	Vendor name		Category	Contact Person	Email	Phone	Rating	Availability	+
☐	Lumiere Catering		Catering	Maria Lopez	maria@lumierecater.com	4155553820	★★★★★	Available	
☐	GrandView Hotel		Venue	Richard Lee	richard@grandview.com	3105552941	★★★★★	Booked	
☐	SoundSphere AV		AV	Jenna Wells	jenna@soundsphereav.com	2135558890	★★★★★	Available	
☐	BloomHouse Decor		Decor	Keiko Tan	keiko@bloomhouse.co	+32 3 555 40 11	★★★★★	Pending	
☐	FastTrack Transport		Transport	Tom Diaz	tom@fasttracktrans.com	+62 655 59090	★★★★★	Available	
☐	+ Add vendor name								
							4.2 / 5		

Integrations:

Connect to “Event Tracker” via Connect Boards column (link vendors to events).

Linked Events		
Tech Vision Expo	Mountain Weddi...	
Charity Dinner Night		
Year-End Party		
Tech Vision Expo	Mountain Weddi...	
Winter Lights Festival		

Create a Form view to allow vendor submissions.

Vendor Management

SidekickIntegrateAut

Main tableVendor Registration Fo...

Back to viewPreviewEditDesignSettings

Vendor Registration Form

Name

0000

Category

Contact Person

Email

Phone

Dashboard Folder:

Widgets:

1. Calendar Widget
2. Chart Widget
3. Workload Widget
4. Numbers Widget
5. Table Widget

monday work management

See plans

Home

My work

More

Favorites

No favorites yet

Recently viewed

Workspaces

BrightWave E...

Client Events

Operations & Vendors

Dashboards

BrightWave Overview

BrightWave Overview

2 connected boards

Type to filter

People

Filter

Calendar

Month

Nov 2025

Month

...

Chart

Numbers

Workload

Today

Weeks

...

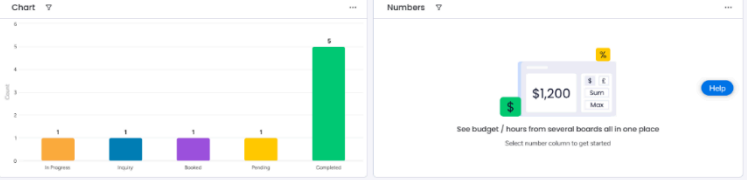
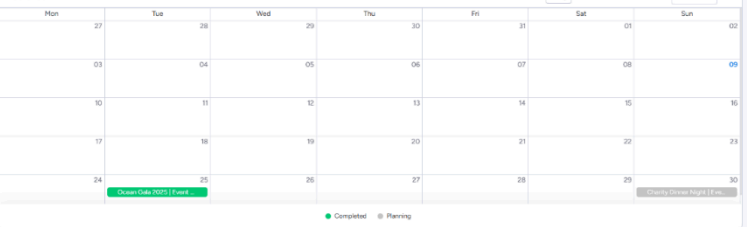
Table

Event Tracker

On-Going Events

Post Events

Vendor Management



Table

Event Tracker | work management | BrightWave Events

On-Going Events

Event name	Client Name	Event Type	Event Date	Assigned Planner	Status
Mountain Wedding	John & Lisa Kim	Wedding	Dec 14		Pending
Tech Vision Expo	Novotech Group	Conference	Jan 8, 2026		Inquiry
Winter Lights Festival	City of Farmport	Festival	Dec 21		Completed
Charity Dinner Night	HopeForAll NGO	Corporate	Nov 30		Pending
Year End Party	Ash-Arcata	Party	Dec 27		In Progress

Post Events

Event name	Assigned Planner	Status

Vendor Management | work management | BrightWave Events

New Group

Vendor name	Category	Contact Person	Email	Phone	Rating	Availability
Lumiere Catering	Catering	Marie Lopez	marie@lumierecater.com	+1 555 5820	★★★★★	Available
Grandiose Hotel	Hotels	Richard Lee	richard@grandiose.com	+1 555 52941	★★★★★	Booked
SoundSphere AV	AV	Jenna Wells	jenna@soundsphere.com	+1 555 54893	★★★★★	Available
BloomHouse Decor	Decor	Kelly Tan	kelly@bloomhouse.co	+1 2 3 555 40 11	★★★★★	Pending
FastTrack Transport	Transport	Tom Diaz	tom@fasttracktrans.com	+1 2 555 59050	★★★★★	Available