Event Planning Checklist

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| **Before the Event** | |
|  | Establish a budget, estimate number of attendees, develop attendance pricing (and promotional pricing for speakers’ guest, large groups) |
|  | Name the event |
|  | Establish the day, date, time, and location (anticipate number of guests, avoid holidays, other industry event dates and major sports game days) |
|  | Reserve the venue (space/room/floor plan, technical equipment, food/beverage, parking, security, insurance) |
|  | Develop the program (goals/mission, theme, logo, workshop/session topics) |
|  | Make arrangements for other services (food, music, entertainment, flowers, transportation, photography, coordinator/facilitator). Remember to make food options available for vegetarians and individuals with food allergies. |
|  | Invite speakers (obtain bio, abstract, white paper, presentation slides) |
|  | Reach out and work with influencers, thought leaders, and media to promote the event |
|  | Set-up registration (create video invitation, links to webinars, share photos, video of past event if reoccurring) |
|  | Send out invitation/distribute information (via social media, e-mail, website); notify award recipients, (include parking and lodging details)- Promotional Plan |
|  | Engage attendees to get them excited for the event (utilize apps) |
|  | Identify sponsors & exhibitors |
|  | Identify staff/volunteers and provide training/direction/rehearsal |
|  | Purchase branding (business cards, table banner, tent, signs, brochures, give-away items), speaker gifts, awards |
|  | Prepare presentation (slides) |
|  | Prepare name badges and registration list |
|  | Send out event reminders |
|  | Confirm final arrangements with venue and other service providers |
|  | Purchase other supplies needed on-site on the day of the event (make checklist of items needed on day of event) |
| **During the Event** | |
|  | Set-up signage (directions to event room, presentation topics/speakers) and decor |
|  | Set-up and check audio-visual equipment |
|  | Set-up registration (attendee list, pens, badges, cash box/credit card reader) |
|  | Distribute information (programs, brochures, promotional items) |
|  | Assist sponsors with display booth set-up |
|  | Hold the event activities |
|  | Record, stream live, take pictures |
|  | Provide breaks (food/refreshments, networking, bathroom breaks) |
|  | Network/meet new people |
|  | Distribute surveys to attendees |
|  | Announce upcoming events |
|  | Thank speaker (with gift) and attendees |
|  | Pay remaining expenses |
| **After the Event** | |
|  | Send thank you to speakers, staff, and attendees |
|  | Publish content presented at the event |
|  | Posts pictures and a summary of the event |
|  | Review lessons learned and survey results (consider implementation) |
|  | Follow-up with contacts met at the event |
|  | Provide an invitation to attendees to the next event |
|  | Record and review event expenses and revenues |