

Event Planning Checklist

The Strategy

- ✦ What is your desired outcome?
- ✦ Who is the target audience?
- ✦ Why will people be motivated to attend?
- ✦ Where do you want the event to be?
- ✦ When do you want the event to be?
- ✦ How are you going to make your event happen?

The Budget

- ✦ What is available to spend on your event?
- ✦ Consider the price you are willing to pay for essentials such as venue, catering, equipment, entertainment, printing etc.
- ✦ Consider the DETAIL – find a further 30% for good measure!

The Timeline

- ✦ Consider dates and the best time of day
- ✦ Give yourself 3 months for a smaller event e.g. seminar, and 6 months for the bigger events e.g. conferences

The Research

- ✦ Research, research, research! This is really important
- ✦ What else is happening on your chosen date?
- ✦ What, if any, Health and Safety procedures do you need to follow or insurance do you need to have?
- ✦ Plan the content and structure of the event

The Attendees

- ✦ Give proper thought to who you want to invite, and why
- ✦ Consider how best to reach the desired audience
- ✦ Set up an RSVP system if required

The Event Profile

- ✦ Detail the “who, what, where, when, why” to those that need to know – the planners, suppliers, associates etc.
- ✦ Ensure everyone is working towards the same vision

The Sponsorship

- ✦ Consider sponsorship as a great way to help cover the costs
- ✦ Put together a sponsorship package
- ✦ Target your preferred choices

The Venue

- ✦ Find a venue that suits your company/brand
- ✦ Check capacity, amenities, access issues etc.
- ✦ Think about food and beverage requirements – do you need canapés, buffet or plated meal
- ✦ Room layout – theatre, classroom, U shape, open square, banquet, boardroom, focus group, networking....
- ✦ Equipment - including screens, projectors, mics, WiFi, easels, whiteboards, pens, electricity etc.
- ✦ Clarify whether equipment will be supplied by the venue
- ✦ Carry out site visits – at different times of the day and unannounced if concerned for parking, staffing etc.

- ✦ Consider lighting – blinds in the room, mood lighting etc., visual obstructions such as pillars
- ✦ Clarify what signage the venue will supply – parking, welcome boards, directional
- ✦ Secure your date and detail your timings including set up, in writing. Contracts are a must!

The Agenda

- ✦ Write a running order for the day
- ✦ Write a clear agenda for the event – by the minute!
- ✦ Ideally display the agenda on a big sheet of paper in the service area so your event team are fully aware of what's happening and when
- ✦ Be prepared to manage speakers and particularly Q&A sessions that overrun
- ✦ This is the time to consider your reason for doing the event again – and be sure that the ‘call to action’ features on your agenda

The Marketing Material

- ✦ Consider how you are planning to inform your desired audience
- ✦ Create event invitations – think about email open rates, sending times etc.
- ✦ Think about social media for your audience
- ✦ Give yourself enough time for professional printing
- ✦ Think about promotional signage – banners etc.
- ✦ Decide on promotional or marketing giveaways
- ✦ Produce good name badges – full name and company they represent
- ✦ Always proofread ALL your promotional material FOUR times.
- ✦ Personal invites will increase your event uptake!

The Event Set Up

- ✦ Consult your running order – and stick to it
- ✦ Enlist help if required
- ✦ Carry out equipment checks
- ✦ Take an essentials stationery kit
- ✦ Have the registration/welcome table ready early with refreshments

The Event Execution

- ✦ Ensure your welcome is perfect!
- ✦ Think about the body language of the event team
- ✦ Tell attendees what to do, and the order of the day
- ✦ Expect a few no-shows
- ✦ Expect technical issues – be prepared
- ✦ Check your agenda – are you doing everything you said you would?
- ✦ ENJOY IT ☺