



Event Planning Checklist

**You'll be able to plan and execute
successful events with ease,
whether you're a seasoned event
planner or a first-time organizer.**

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What to Include in a Strategic Event Plan

The planning process may begin with a brainstorming session as you consider the purpose of your event, what you hope to accomplish, and what resources are available. Keep in mind that, while it's important to cover all your bases and not overlook important details, there is something to be said for brevity. Being concise - perhaps even limiting your event plan to one page - can encourage clarity and make you more likely to follow it.

Keeping a plan short may be especially useful if you are creating an event template that other members of your organization will use to arrange future events. Having a clear protocol to follow will make it easier to maintain standards and requirements as team members and event details fluctuate.

As you think about how to craft an event that will meet your objectives, here are a few things to keep in mind and include in your plan:

- **Purpose of Event:** In addition to vital event details like dates, times, location, and other logistics, it's important to know what you hope to achieve. Do you want to accomplish a specific goal such as fundraising or education? Maybe you want your event to meet several objectives, such as launching a product, increasing brand awareness, and boosting sales. Keeping the purpose of the event in mind can help you develop an effective strategy for meeting those objectives.
- **Target Audience / Ideal Avatar:** Identifying your target audience and their needs can guide your marketing efforts as well as your event planning. How will you meet their needs? How will your event stand out from the competition?

- **Event Benefits and Value:** Once you determine what your audience needs, you can identify the speakers, entertainment, activities, and messaging that will be most effective. Does your event offer a unique value proposition that potential attendees won't want to miss?
- **Event Marketing and Metrics:** Outline all of the marketing channels you will utilize to promote your event, and create a timeline for each phase of marketing. In addition to metrics for tracking the effectiveness of your campaigns, identify any other key metrics that you'll use to evaluate the event as a whole.
- **Budget:** Consider both costs and revenue as you plan your event.

All of these elements will dictate what you need to include in your event planning checklist and timeline.

Event Planning Checklist

Here is a sample event planning checklist that includes key tasks and considerations for planning and executing a successful event. This template is designed to give you a baseline for any type of event you may plan. It is essential to customize it for the specific event you are working on.

6-12 Months Before the Event

- Define your event goals and objectives.
- Establish your event budget and revenue goals.
- Choose the event date and location.
- Research and secure vendors and suppliers, such as catering, audiovisual, and transportation.
- Develop the event concept and theme.
- Research and book speakers or entertainment.
- Develop your marketing plan and start promoting your event.
- Create an event website or landing page.
- Develop your registration process and ticketing system.
- Start planning your event schedule and agenda.
- Obtain any necessary permits or licenses.
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4-6 Months Before the Event

- Finalize the event schedule and agenda.
- Finalize vendor and supplier contracts.
- Create a detailed event budget and track expenses.
- Start building relationships with event sponsors and partners.
- Develop and implement your social media plan.
- Plan and book event transportation.
- Develop your event security plan.
- Plan your event signage and branding.

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2-4 Months Before the Event

- Finalize all speaker or entertainment contracts.
- Finalize all catering arrangements.
- Develop and implement your event volunteer plan.
- Start planning your event setup and layout.
- Develop and distribute any event materials, such as handouts or brochures.
- Finalize any audiovisual or technology needs.
- Develop and distribute any event surveys or polls.

1 Month Before the Event

- Conduct a final walkthrough of the event venue.
- Confirm all vendor and supplier arrangements.
- Confirm all speaker or entertainment arrangements.
- Develop your event timeline and load-in/load-out schedules.
- Confirm all transportation arrangements.
- Conduct any necessary training for event staff and volunteers.
- Review your registration and ticketing process.
- Send final reminders and updates to attendees.

1 Week Before the Event

- Conduct a final review of all event logistics.
- Confirm all audiovisual and technology needs.
- Confirm any catering or beverage needs.
- Confirm any transportation needs.
- Confirm any security needs.
- Finalize your event seating plan.
- Develop your event signage and banners.

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Event Day

- Set up the event venue and signage.
- Conduct any necessary audiovisual or technology checks.
- Confirm all catering, beverage, and transportation arrangements.
- Manage event registration and ticketing.
- Manage event security and emergency response.
- Manage any necessary event cleanup and load-out.

Post-Event

- Conduct a post-event debrief and review.
- Send out event surveys or polls.
- Follow up with attendees, sponsors, and partners.
- Review event feedback and make improvements for future events.
- Update your event website and marketing materials.
- Evaluate the success of your event and adjust your event planning process as needed.

Each event is different and has its own set of tasks to complete, but this list will give you a jumpstart.

Using a planning tool like Trello, Asana or ClickUp will help keep your tasks organized and your team on track. For smaller events, you can use a spreadsheet but be sure you have a way to keep your team informed.