



The Ultimate Event Planner's Checklist

Sticky notes. Reminders on the refrigerator. Alerts on a cell phone.

Whatever the chosen method, the goal is the same: to try and remember to do something.

In event planning, there are numerous items to remember but unfortunately the human brain can only keep track of a few things at a time.

Why leave the rest to chance? Create the ultimate event planner's checklist to keep you organised and on schedule – from the early planning stages right through writing the post-event reports.

Developing the ultimate event planner's checklist that is customised to your event will assist you with every stage of event planning. It ensures that details are not lost, and tasks forgotten, keeping you calm and in charge as you accomplish each task one by one.

The top ten most important steps in this checklist can be summarized as follows:

Event Planning Checklist

1. Establish your event goals and objectives.
2. Select your event's date.
3. Develop an event master plan.
4. Create an event budget.
5. Brand your event and begin publicity.
6. Arrange sponsorships and speakers for your event.
7. Launch ticket sales.
8. Coordinate with event suppliers (catering, equipment, etc).
9. Manage event day set up and execution.
10. Conduct a thorough evaluation of your event.



The First Steps in Your Event Checklist: 4-6 Months Ahead of Event

The further in advance you can start planning, the better — but I've noticed that most organizations we work with start planning their big events like galas and fundraisers about 6 months in advance. Here's what you need to do to get started.

- **Establish your event goals and objectives.** Did you want to raise money or awareness? How many attendees are you hoping to get? Establishing it up front will make it easier to gauge the success of your event. (For tips on getting more event attendees, [click here](#).)
- **Select the date.** And make sure it doesn't conflict with any other events taking place in your area, or any major holidays.
- **Identify venue and negotiate details.** What kind of insurance does the venue require? Can you serve alcohol? Determine the requirements before committing.
- **Develop an event master plan.** Ironing out every detail will help ensure you don't miss a thing.
- **Get cost estimates.** Some costs you might need to consider are:
 - Room rental
 - Food and beverages
 - Equipment
 - Speaker fees
 - Travel for staff
 - Insurance
- **Create an event budget.** Based on the costs above, you'll be able to determine how much your event will cost — and if you'll need to reduce any of them!
- **Recruit an event committee.** This includes selecting an event manager or chair and establishing sub-committee chairs.
- **Brand your event.**
 - Start building out an event website or pages on your website that describe the event.
 - Develop an event logo and tagline.
- **Create and launch publicity plan.** This includes ensuring staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.
- **Identify and confirm speakers/presenters/entertainers.** Who will you need on hand during the event?
- **Identify and contact sponsors/partners.**
- **Determine if you need event registration software to make the process easier.** There are a variety of different software tools that can help streamline the event process.
- **Determine if you need other event management software.**
- **Release early-bird tickets.**
 - Ensure registration forms are accessible and allow space for preferred pronouns and preferred names.



3-4 Months Ahead of Event: Starting to Ramp Up

Now that you have some of the foundational parts of your event figured out, it's time to start executing on the rest. If your event is coming up in a few months, you'll need to start communicating with all the stakeholders outside your organization and continue coordinating with them. Some points you'll need to remember include:

- **Build out required documents for your team.**
- **Speaker/presenter/entertainer liaison:**
 - Finalize presentation/speech topics
 - Get bio information, photo
 - Travel & accommodation arrangements
 - Have contracts signed if appropriate
 - Ask speakers to start promoting and sharing it with their network
- **Financial/Administration:**
 - Determine registration fees
 - Set up and enable online registration
 - Finalize sponsor levels and amounts
 - Identify items to be underwritten and accounting tracking details
- **Venue and logistics planning:**
 - Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.
 - Review security needs/plan for the event with venue manager
 - Investigate need for any special permits, licenses, insurance, etc.
 - Assess accessibility requirements (e.g. all-gender restrooms, wheelchair accessibility, etc).
 - Communicate accessibility requirements to staff.
- **Follow publicity plan:**
 - Develop draft program
 - Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
 - Develop publicity pieces -- e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.
 - Request logos from corporate sponsors for online and printed materials
 - Develop and produce invitations, programs, posters, tickets, etc.
 - Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)
 - Create event page on your website
 - Enable/create email event notifications
 - Create a Facebook event page
 - Develop a promo video and post on YouTube and your Facebook page
 - Register your event on a variety of online event calendars
 - Create some buzz on your blog or member forums
 - Determine VIPs and create invitation & tracking document (e.g., spreadsheet)

1-2 Months Prior To Event: Keep on Going

You're getting there! At this point, you're probably spending more and more time focusing on the event and finalizing some details.

- **Send reminders to your contact list regarding registration and participation.**
- **Reach out again to presenters/speakers regarding:**
 - Confirming travel and accommodation details
 - Request copy of speeches and/or presentations
- **Sponsorship finalization:**
 - Follow up to confirm sponsorships and underwriting



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- Get any promotional materials you'll be sharing at the event
- Ask sponsors to share event on their promotional channels
- **Continue executing on your publicity plan:**
 - Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
 - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.
 - Post more details about your event on social media
- **Close early-bird tickets;** release standard pricing.
- **Finalize and proofread printed materials.**

1 Week Prior to the Event: The Home Stretch

You're getting so close! By this point, most of the event details should be confirmed and all that's left will be final touches, such as:

- **Have all committee chairs meet and confirm all details against Master Plan.** You should also ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc).
- **Finalize event script.**
 - Assign practice sessions for anyone who has a speaking slot.
- **Brief any/all hosts, greeters, volunteers about their event duties and timelines.**
- **Finalize your seating plan.**
 - Ensure it includes wheelchair-accessible areas and has clear paths through the venue.
- **Provide final registration numbers to caterer.**
- **Make print and online copies of any speeches, videos, and presentations.**
- **Do a final registration check, including name badges & registration list.** Depending on when your registration closes, this may not be possible until a few days in advance but try to finish it as early as possible.
- **Determine photo op and interview opportunities with any presenters and VIPs.**
- **Confirm details with media attendees.**

1 Day Before the Event: Almost There

Here are a few last-minute details you might want to remember:

- **Confirm media attendance.**
- **Ensure all signage is in place** — both around the venue and any other areas in which it's needed.
- **Ensure registration and media tables are prepared** and stocked with necessary items (such as blank name badges, paper, pens, tape, stapler, etc.)
 - Ensure there are enough outlets. If not, consider bringing power bars for attendees and your team.
- **Ensure all promo items, gifts, plaques, trophies, etc. are on-site.**
- **Ensure all A/V equipment is set up and working properly.**
- **Get a good night's sleep!** You'll need the rest before the exciting day to come.



Event Day: Your Time to Shine

The big day has arrived! Here's what you must remember:

- **Take a few deep breaths — you got this!**
- **Ensure you have copies of all instructions**, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- **Check in with each Committee Chair** to ensure their team is on track.
 - Also check in with catering and any sponsor teams that are attending.
- **Assist sponsors, speakers, and other teams as needed.**
- **Greet new attendees.**

Immediately Following Event: Post-Event Follow-Up

While you need to conduct a thorough evaluation and update your budget, there are post-event publicity, fundraising and member development opportunities that you can take advantage of with just a little pre-event planning.

Here are some of the activities you might consider once the event is over:

- **Check in with venue.** Ensure nothing important was left behind.
- **Financial status:**
 - Gather all receipts and documentation, final registration data, etc. and
 - Update budget
- **Send thank-you's and acknowledgement letters to:**
 - Sponsors
 - Volunteers
 - Speakers/presenters
 - Donors
 - The media

In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.

- **Post-event publicity:**
 - Send out an email to your subscriber base with highlights from the event
 - Make a publicity reel video to share how it went (and as a bonus, you can use it as publicity next year!)
 - Share highlights on social media
 - Update website page to reflect that it's a past event.
- Conduct a post-event survey. **Learn** what people enjoyed about your event and where you have room to improve.
- **Reach out to event participants.** Thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering, or making a sustaining donation.
- **Conduct a team debrief to learn their thoughts.**
- **Conduct a thorough evaluation of the event.** What went well and what could you do better next time?





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