

cmx



# The Ultimate Event Planning Checklist

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Print and use this checklist to ensure you're ready for each step of your event!



Event Name	
Date	
Location	
Number of Guests	
Event Planner	
Event Description	

## Notes

# The Ultimate Event Planning Checklist

## 12 - 6 Months Prior to the Event

	Point of Contact	Due Date	Done
Establish Event Concept <input type="checkbox"/> Event name <input type="checkbox"/> Event theme <input type="checkbox"/> Set goals and objectives <input type="checkbox"/> Estimate the # of attendees			<input type="checkbox"/>
Select the date and time			<input type="checkbox"/>
Estimate the costs <input type="checkbox"/> Venue Rental <input type="checkbox"/> Food and beverage <input type="checkbox"/> Travel and lodging <input type="checkbox"/> Rental equipment <input type="checkbox"/> Speaker fees <input type="checkbox"/> Staff fees <input type="checkbox"/> Insurance			<input type="checkbox"/>
Set an event budget			<input type="checkbox"/>
Build the event team			<input type="checkbox"/>

# The Ultimate Event Planning Checklist

## 12 - 6 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
<p>Book venue</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Research venues and their availability</li> <li><input type="checkbox"/> Narrow down your venue options</li> <li><input type="checkbox"/> Set up a meeting with the venue, discuss and confirm details about the event</li> <li><input type="checkbox"/> Confirm accessibility and the equipment needs</li> <li><input type="checkbox"/> Get a quote</li> <li><input type="checkbox"/> Review venue contract</li> <li><input type="checkbox"/> Get Insurance</li> </ul>			<input type="checkbox"/>
<p>Develop event branding</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Logo and tagline</li> <li><input type="checkbox"/> Color scheme</li> <li><input type="checkbox"/> Typography</li> <li><input type="checkbox"/> Event landing page</li> <li><input type="checkbox"/> Ticket Design</li> </ul>			<input type="checkbox"/>

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12 - 6 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
<p>Select and Contact Prospective Speakers</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Create a list of speakers that match your event concept</li> <li><input type="checkbox"/> Confirm their availability and budget requirements</li> <li><input type="checkbox"/> Brainstorm speech topics</li> </ul>			<input type="checkbox"/>
<p>Come up with a plan for promoting your event</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Determine the attendee persona</li> <li><input type="checkbox"/> Brainstorm ways to reach them</li> <li><input type="checkbox"/> Create promotional materials</li> <li><input type="checkbox"/> Set up your mailing list</li> </ul>			<input type="checkbox"/>
<p>Determine your tech stack</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Conferencing tool</li> <li><input type="checkbox"/> Event registration system</li> <li><input type="checkbox"/> Event app (if applicable)</li> </ul>			<input type="checkbox"/>

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12 - 6 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
<p>Identify sponsorship opportunities</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Research and review the list of potential sponsors</li> <li><input type="checkbox"/> Prepare a sponsorship packet with information about your event</li> <li><input type="checkbox"/> Contact each potential sponsor by sending out individual sponsorship letters</li> <li><input type="checkbox"/> Review and sign the contracts</li> </ul>			<input type="checkbox"/>
<p>Set up your registration system</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare your registration form</li> <li><input type="checkbox"/> Determine registration fees</li> <li><input type="checkbox"/> Finalize a dedicated landing page for registrations</li> <li><input type="checkbox"/> Identify a payment processor</li> </ul>			<input type="checkbox"/>
<p>Release early-bird tickets</p>			<input type="checkbox"/>

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12 - 6 MONTHS PRIOR TO THE EVENT

**Notes** 

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## 6 - 3 Months Prior to the Event

	Point of Contact	Due Date	Done
Get your speakers on board <input type="checkbox"/> Confirm speech topics <input type="checkbox"/> Sign contracts <input type="checkbox"/> Get speaker bio and headshot <input type="checkbox"/> Plan the speaker's arrival and departure dates <input type="checkbox"/> Ask speakers to help get the word out about your event by sharing information with their network			<input type="checkbox"/>
Map out your event agenda			<input type="checkbox"/>
Getting your venue ready <input type="checkbox"/> Room Layouts/Floor Plans <input type="checkbox"/> Seating Chart <input type="checkbox"/> Verify any equipment needed, including A/V equipment, tables, chairs, and other supplies <input type="checkbox"/> Confirm parking spaces <input type="checkbox"/> Check for any necessary permits and licenses <input type="checkbox"/> Review safety and security plan			<input type="checkbox"/>



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## 6 - 3 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
<p>Planning the logistics</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Research potential vendors</li> <li><input type="checkbox"/> Review food and beverage options with vendors</li> <li><input type="checkbox"/> Receive quotes from vendors</li> <li><input type="checkbox"/> Confirm preferred vendors by emailing them your contract</li> <li><input type="checkbox"/> Include a contingency plan for emergencies</li> </ul>			<input type="checkbox"/>
<p>Start executing your event promotion plan</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Create promotional calendar</li> <li><input type="checkbox"/> Set up an email marketing campaign for both your attendees and potential attendees and start sending out emails</li> <li><input type="checkbox"/> Review all of the information that is on your website</li> <li><input type="checkbox"/> Promote your event on social media</li> <li><input type="checkbox"/> Create a media kit (if applicable)</li> <li><input type="checkbox"/> Create and send email notifications for the upcoming event</li> </ul>			<input type="checkbox"/>

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## 6 - 3 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
Start executing your event promotion plan ( <i>cont.</i> ) <input type="checkbox"/> Create an event page on Facebook and LinkedIn <input type="checkbox"/> Post related content about your event on your blog			<input type="checkbox"/>
Block the hotel rooms for your speakers and staff			<input type="checkbox"/>
Select and book a photographer or a videographer (if applicable)			<input type="checkbox"/>
Secure A/V Equipment <input type="checkbox"/> Sound system <input type="checkbox"/> Lighting <input type="checkbox"/> Microphones <input type="checkbox"/> Video projector <input type="checkbox"/> Live-streaming equipment			<input type="checkbox"/>
Secure entertainment <input type="checkbox"/> Select and contact the emcees <input type="checkbox"/> Schedule and book DJ (if applicable) <input type="checkbox"/> Get your photo booth ready (if applicable)			<input type="checkbox"/>

# The Ultimate Event Planning Checklist

6 - 3 MONTHS PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
Find and get volunteers on board			<input type="checkbox"/>

## Notes

## 3 - 1 Months Prior to the Event

	Point of Contact	Due Date	Done
Approve final agenda and get the word out			<input type="checkbox"/>
Draft script for your event			<input type="checkbox"/>
Get your event signage ready			<input type="checkbox"/>
Send reminder about your event to the registered attendees			<input type="checkbox"/>
Order gifts for your speakers, hosts, and volunteers			<input type="checkbox"/>
Prepare your event swag			<input type="checkbox"/>
Confirm all travel arrangements			<input type="checkbox"/>

### Notes

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## 1 Week Prior to the Event

	Point of Contact	Due Date	Done
Confirm all vendors and subcontractors are booked			<input type="checkbox"/>
Send out a final timeline to all vendors with contact information and expected arrival times			<input type="checkbox"/>
Finalize event script			<input type="checkbox"/>
Finalize seating arrangements			<input type="checkbox"/>
Confirm any special requests from attendees			<input type="checkbox"/>
Finalize the event script and make sure that your hosts and volunteers are fully informed on what they need to do throughout the event			<input type="checkbox"/>
Finalize registration list			<input type="checkbox"/>
Meet with all the key players prior to the event			<input type="checkbox"/>
Do a final inspection of the event venue			<input type="checkbox"/>
Send a reminder to all attendees, including important information such as directions and check-in details			<input type="checkbox"/>

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1 WEEK PRIOR TO THE EVENT

	Point of Contact	Due Date	Done
Print everything you need for your event: tickets, name tags, programs, etc.			<input type="checkbox"/>
Confirm all catering is ordered and ready for the morning of the event			<input type="checkbox"/>

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## 1 Day Prior to the Event

	Point of Contact	Due Date	Done
Confirm any special equipment (staging, sound system, etc.) has been delivered to the venue			<input type="checkbox"/>
Make sure that the AV system has been tested and that all equipment is working correctly			<input type="checkbox"/>
Final registration check			<input type="checkbox"/>
Set up the event space, including any tables or other furniture			<input type="checkbox"/>
Get your event day checklist ready			<input type="checkbox"/>

### Notes

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## Day of the Event

	Point of Contact	Due Date	Done
Confirm all vendors/suppliers have arrived and are set up on time			<input type="checkbox"/>
Do a final walkthrough of each room, making sure everything is in its place			<input type="checkbox"/>
Confirm that all equipment, furniture, and decor is set up			<input type="checkbox"/>
Make sure you have your event day checklist with you at all times			<input type="checkbox"/>
Post reminders about your event on social media and send out the last emails			<input type="checkbox"/>

## Notes



## Post Event Action Items

	Point of Contact	Due Date	Done
Confirm that all vendors have been paid and are on their way home			<input type="checkbox"/>
Clean up and confirm that all trash has been removed from the venue			<input type="checkbox"/>
Confirm that all equipment has been packed up and is ready to be shipped back to the rental company			<input type="checkbox"/>
Send out a thank you email to all your attendees			<input type="checkbox"/>
Send out thank-you notes <input type="checkbox"/> Sponsors <input type="checkbox"/> Volunteers <input type="checkbox"/> Speakers/Presenters <input type="checkbox"/> Staff			<input type="checkbox"/>
Publish an event recap content on your blog and social media			<input type="checkbox"/>
Schedule follow-up meetings with the team			<input type="checkbox"/>
Send out the post-event survey to your attendees			<input type="checkbox"/>
Follow up with any new leads generated from the event			<input type="checkbox"/>

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POST EVENT ACTION ITEMS

**Notes** 