

Advanced Checklist for Corporate Event Planning

- PRIVATE/INTERNAL EVENTS -

This checklist is a guide for anyone planning internal events which are only open to employees and those within the organization to attend.

This includes:

- Company-wide conferences
- Meetings
- Training
- Sales meetings
- Product reveals (before the public official launch)
- Board retreats
- Team building or leadership retreats
- Private dinners, parties, award ceremonies

Disclaimer: Every event is different. Although we have aimed to create a comprehensive guide it is impossible to list every single task that must be done for every single event. This list is shared as a helpful reference and should be adapted to your specific event brief, timeframe and processes. Adapt the list to the items and order of working that works for you. We accept no responsibility for any items that may be omitted. If you have suggestions for action items to be added to the checklist please email contact at [eventmanagerblog.com](mailto:contact@eventmanagerblog.com).

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- PRE EVENT -

THE BASICS

- Set your event objectives. What is the purpose of the event? What should be the outcomes? What will success look like?
- Who is the event for?
- When will the event take place? Do you have a few date options? What is the best day?
- Check for any clashes with internal schedules and deadlines for those that need to attend.
- How many people are expected to attend? What are the maximum and minimum numbers anticipated?
- Give the event project a name.
- Where will the event take place? Will it be on-site within company offices? Or at an external venue?
- Is AV required?
- What is the format and timings of the event?
- Who are the core team that will make the event happen? Will the event be run internally or will you take on an external event planner/event planning agency?
- What budget is available for the event? Do extra funds need to be sought?
- How will attendees confirm their attendance and any special dietary and other requirements?

RESEARCH AND CONTRACTING

If happening offsite:

- Research potential locations and venues to come up with a shortlist.
- Check venue availability and pricing.
- Consider whether you will use internal or external AV.
- Organize site visits.
- Negotiate terms and specifics with the venue.
- Sign venue contract.

If happening onsite:

- Check that everything is available to you onsite and can be allocated to you on the event date.
- Hire in any additional AV, furniture, linen, catering and equipment as required.
- Look critically at how the event will flow and fit. Where do people sign in, where will they have lunch, will changing the room layout work?

- Start creating a budget, adding in income and expenditure items. Estimate figures where necessary and replace with firm quotes as they are received.
- Confirm availability and details with any speakers, performers and special guests.
- If relevant, speak to sponsors, partners, exhibitors and other stakeholders to get them on board early. Private events may still have external stakeholders involved.
- Start talking to vendors and getting prices and advice.
- Ensure all the key people have the date blocked out in their diary.
- Coordinate accommodation room block and travel as necessary.
- Confirm registration/RSVP process.
- Get sign off from the legal team and senior management as required.

PROJECT MANAGEMENT

- Identify key staff roles and responsibilities.
- Define key milestones and critical deadlines.
- Allocate specific tasks and action items as required.
- Agree team communication, reporting and meeting expectations.

PROGRAM

- Confirm the program for the event.
- Ensure there are enough breaks and down time and that the timings are realistic. The time spent outside of the structured sessions can be equally valuable.
- If you are holding the event at your offices consider that in a non-purpose-built event space serving food and refreshments and comfort breaks may take longer.
- What time is access available for set up?
- When can those attending access the venue/room?
- When must the venue/room be vacated?

BRANDING

- Will there be a specific event logo?
- Develop branding and identity guidelines.
- Gather logos from any key stakeholders, including partners and sponsors.
- Be aware of any specific agreements in terms of logo placement and branding.

COMMUNICATIONS AND REGISTRATION

- How will those attending be notified about the event and their requirements/request to attend?
- Is there a company intranet/newsletter where details should be added?
- Set up the online event registration process, if relevant. Even if it is a free event it is useful to have a system to manage RSVPs and attendance.
- What is the deadline to RSVP/confirm attendance?
- How will this be followed up?
- How will the team communicate onsite with each other?
- If at a venue, what is the quickest way to communicate with key personnel?
- How will any issues be escalated?

VENUE (IF UTILIZING AN OFFSITE LOCATION)

- Create room allocations and layouts so you know the maximum and minimum numbers for each space and configuration options.
- What are specific unloading, load in/load out, parking and goods lift information that should be shared with staff, exhibitors and suppliers.
- Does the venue have machinery such as scissor lifts, forklifts, and operators available? Or do these need to be brought in if required.
- Request the evacuation procedures.
- Discuss specific instructions for guests with accessibility issues.
- Keep the venue informed of anyone attending with special needs.
- Confirm the key points of contact for the planning process and on the day.

- Note the deadline to complete final Banquet Event Order (BEO) and return final details to the venue.
- Test WiFi bandwidth. Boost, upgrade or find alternatives if required.
- Return BEO by the deadline.

VENUE CATERING (IF UTILIZING AN EVENT VENUE)

- Consider and confirm the event catering.
- Agree catering timings and service.
- How will queues be minimized and people served quickly?
- Confirm final catering numbers and dietary requirements.
- What are the arrangements for staff, crew and VIP catering?

ROOM SET UP (IF UTILIZING AN ONSITE, OFFICE LOCATION)

- Confirm room layouts and maximum numbers.
- Will the room be set up the day before or on the morning of the event?
- Check that guests with accessibility issues will be able to move about in comfort and without obstruction.
- If employees are attending from other offices ensure that they have the room, venue and parking instructions.
- Share company WiFi details with all attending, if coming from other offices.

CATERING ARRANGEMENTS (IF UTILIZING AN ONSITE, OFFICE LOCATION)

- Research catering suppliers or whether your company canteen can supply catering for the meeting/event.
- Consider and confirm the event catering.
- Confirm whether food is prepared onsite or offsite.
- Is kitchen access required?
- What is supplied by the catering company? For instance are crockery, cutlery, linen/napkins included or should they be hired in separately? What are the arrangements for collecting these items afterwards?
- Agree catering timings/drop off.

- Are serving staff included or is it just delivered to site?
- Confirm final catering numbers and dietary requirements.

SPEAKERS AND PERFORMERS

- Fully brief external speakers and performers on the requirements, specifics and expectations of the event, including the audience profile.
- If senior management and staff are speaking at the event still brief them fully and offer your support. Do they need you to prepare anything for them or create their slide deck?
- Discuss any expectations in terms of filming and photography.
- Sign contracts with external presenters and artistes.
- Book travel and accommodation as required.
- Confirm rider requirements, tech spec and entourage.
- Allocate green room.
- Outline arrival and departure times.
- Set deadlines for content.
- Brief on AV set up.
- Share details of any eventtech to be used.
- Confirm rehearsal timings.
- Confirm contact numbers.
- Create scripts, imagery, cues, intro music as required.
- Who will meet and greet VIPs?
- Gather headshots and bios to brief the host, staff and venue about who your VIP guests are.

EVENT TECHNOLOGY

- Consider whether eventtech could enhance the event.
- Research event technology options and outcomes.
- Have demos and get quotations from potential suppliers.
- Shortlist and choose the best solution.
- Train up staff.
- Set up the eventtech tool.

- Brief and share with the relevant people.
- Implement the event tech.
- Communicate to attendees.
- Provide support and encouragement to maximize ROI on the technology.
- Ensure charging stations and plug sockets are available.

Further information on event technology can be accessed here:

<https://www.eventmanagerblog.com/event-technology>

MEETING DESIGN AND ENGAGEMENT

- Have a detailed discussion with the facilitator/MC/Chair about the aims of the event, challenges and specifics.
- Think about ways to maximize learning and outcomes.
- Consider delivery, engagement and room layout.
- Can event technology support the meeting design objectives?
- Support those presenting in terms of how to get the most from their session.
- Think about the overall plan of the day.
- Consider how effectiveness and outcomes will be measured.

BUDGET

- Keep your event budget headings and figures up to date.
- Does additional budget need to be identified? Is this possible via different internal budgets? Who has authorization for that?

VENDORS/SUPPLIERS

- Have meetings and site visits as required to finalize the specifics of the event.
- Enter into agreements and contracts as vendor specifics are confirmed as required throughout the process.

AUDIO VISUAL (AV)

- Book/confirm AV as required.

- If you are using in-house equipment from your offices, test it in advance and ensure that you have back up equipment, spare bulbs, etc. In case of any problems is there anyone you can call on to assist?
- If you are bringing in an external AV supplier or working with the venue AV provider, even if you are not sure of the precise equipment required you can explain to your AV supplier the effect that you want to create and share examples from other events.
- Ensure the stage (if you have one) is large enough to accommodate podiums, tables, chairs, sofas, as required and safely. How is access to the stage? From backstage only? One set of steps or multiple?
- Carefully check through all presentations, graphics and visuals and link them all together.
- Triple check the number and type of microphones and when mic changeovers will take place, if microphones are required.
- When can the AV team have access for set up?
- What time must everything be ready?
- Will there be rehearsals and run throughs? When?
- What are the contingency plans for technical issues?

STAFFING

- Have all staff had a clear briefing about the event and the likely questions they will be asked.
- If they are unsure of something what is the protocol?
- Are staff clear about the dress code?
- Specific timings, roles and responsibilities should be agreed in advance.

MARKETING AND SOCIAL MEDIA

- The objectives of promoting a private/internal event may be different to a public, ticketed event but you still might be looking to create an event marketing plan to help raise excitement for the event or promote it within private company channels.
- Encourage networking opportunities and connections prior to the event as this is great for company morale.
- If there will be a photographer and/or videographer, brief them in terms of key shots and footage required and turnaround times.

- What is the policy in terms of photographs and filming at the event? Do disclaimers need to be signed and permissions sought? Has the policy been clearly communicated to attendees?

EVENT STYLING AND DECOR

- Is there a theme for the event? If so how will this flow through the event?
- How can you create impact, wow factor and photo opportunities within the event?
- Do additional flowers need to be ordered?
- If it is a seated event or dinner, consider the linen, table settings and centerpieces.

BRANDING

- What opportunities are there for branding and signage across the event?
- What are the specific formats and deadlines for items, for instance digital signage.
- Do you need banners, signage, printed panels, step and repeats and other items to be designed and printed?

EXHIBITORS

- If you have exhibitors at your event ensure that you create an exhibitor manual and communicate clearly in terms of key information and deadlines.
- Outline precisely what they get (space only, exhibition shell scheme, furniture, power, WiFi) and instructions including set up times, unloading, arrangements for passes, health and safety requirements/guidance, etc.

HEALTH AND SAFETY

- Ensure that you have the relevant permits and licenses in place.
- Ensure adequate insurance cover is in place for the event.
- What are the arrangements in terms of security, bag checks and so forth?
- Check risk assessments, method statements and insurance documents from vendors, exhibitors, performers, etc.
- Identify any specific risks.
- Identify contingency plans.

- Create an overall event risk assessment.
- Share copies with the relevant people.

FINAL PREPARATION

- Send out final attendee confirmation and information.
- Create a logistics checklist of all items, who is responsible for each and where it needs to go on site.
- Are any gifts or tips needed for anyone?
- Check all information has been returned, presentations from speakers, risk assessments and proof of insurance from all suppliers.
- Ensure all essentials are in your event manager box(es). This will include items such as blue tack, screwdriver, post it notes, spare pens, extension leads, gaffa tape, and much more.
- Share and print copies of any important documents that you will need to reference.
- Create a master running order and variations of this such as specific supplier, staff and Chair notes, including load in and load out.
- Provide final staff briefings and instructions.
- Collate goodie bags, delegate folders, handouts and giveaways as appropriate.
- Prepare badges/place cards/table numbers.
- Print signage.
- Load/arrange transportation of all event items and equipment.
- Ensure you have all possible cell phone numbers and contacts listed on your master contact sheet and that everyone that might need it has copies. Enter them into your phone if possible.
- Give a courtesy call to all key people involved, particularly speakers and performers.
- Send out a final reminder to attendees.

- SET UP, LIVE EVENT AND DE-RIG -

PROGRAM

- Keep the team informed of progress and timings in different rooms so that adjustments can be made if necessary.
- Notify the venue/catering ASAP of any changes.

BRANDING

- Triple check all branded elements. You don't want branded items to be crooked or show wrinkles on all the pictures.
- After the event, package, label, transport and store branded items that can be reused next year.

WEBSITE AND REGISTRATION

- Ensure any final messages and contact details are added to the website.
- Advise on the website and registration site if tickets are available for purchase on the door and will remain on sale online.
- Keep ticket sales open for as long as possible online.
- Brief all registration staff. Ensure they know where pre-registered attendees, VIPs, on site ticket sales and exhibitors should be directed to.
- Ensure staff are in place to meet VIPs and escort them to the relevant person and place.
- Notify the relevant staff when key people arrive so they are ready to receive them.
- If the event fees change on the day of the event ensure the price change is scheduled and has taken effect.
- Test barcode scanners/tablets used for check in.
- If you are printing badges on site do a test before the public arrive.

REGISTRATION

- Brief all registration staff. Ensure they know where attendees, presenters and VIPs should be directed to.

- Ensure staff are in place to meet VIPs and escort them to the relevant person and place.
- Notify the relevant staff when key people arrive so they are ready to receive them.
- Test barcode scanners/tablets used for check in.
- If you are printing badges on site do a test before the public arrive.

FINAL CHECKS

- Check the number of chairs and layout.
- Check flipcharts, markers, post-it notes, pens, notepads and so forth are ready in the relevant rooms.
- Test the WiFi.
- Talk through key timings with the event team.
- Check toilets are clean, fully operable and stocked with soap, toilet roll and hand towels.

VENUE CATERING (IF UTILIZING AN EVENT VENUE)

- Talk through the timings and all details with the catering manager on the morning of the event, including any last minute changes to final numbers and dietary requirements.
- Verify the procedure for those with special dietary requirements. Will they have a special plated meal or will venue catering staff advise them of the options at the point of service?
- Check the riders for the performers.
- Check that glasses and water are available for presenters and performers on stage and back stage.
- In the case of extras, such as additional bottles of wine being requested, agree who has authorization for these items and the procedure.
- If there is a surplus of food in any areas, make arrangements to donate it to those in need.

SPEAKERS AND PERFORMERS

- Check sound, lighting, presentations, video, cues, technology during the rehearsal/briefing.
- Agree specifics such as cues, signals, who will collect from the green room and so forth.
- Tick off speakers and performers as they arrive.

MEETING DESIGN AND ENGAGEMENT

- If you are in an unfamiliar room/office/venue, ensure you know how to ensure participant comfort. How do you operate the blinds, air con, heating, lights, etc?

BUDGET

- If last minute items are required from the venue or purchased off site who will authorize this and how will it be paid for?

VENDORS/SUPPLIERS

- Check in with all suppliers to make sure they are ready on time and there are no issues to report.

EVENT TECHNOLOGY, AV AND PRODUCTION

- Do final tests and checks, including run throughs with facilitators and presenters who will be using it.
- Introduce performers and speakers to the AV team, senior management and other presenters as relevant.
- At the end of the event, get copies of final presentations (there may have been changes made on site), data from eventtech, etc.

STAFFING

- If there are any hold ups/absence in terms of staff re-allocate roles as necessary.
- Sign out radios to relevant staff.
- Do radio checks.

- Ensure radios are signed back in after the event.

EVENT STYLING AND DECOR

- Have a final check to make sure everything is in place and looks as it should.

EXHIBITORS

- If they are leaving any items for collection the next day, ensure they label it correctly and store it in the right place, ready for future collection.

HEALTH AND SAFETY

- Do a final walk through in terms of health and safety.
- Check you have all signed off completion forms and final paperwork you need from exhibitors, the AV team, venue electrician, etc.
- Confirm whether any test fire alarms are planned.
- Make sure the host knows the evacuation procedure, has notes and is ready to share it with attendees.
- If there are any health and safety incidents on site make sure the details are noted in full, including statements and contact details for everyone involved.

MISCELLANEOUS

- Label up any items that are being collected by courier after the event and take them to the venue collection point/loading bay.

- POST EVENT -

PROJECT MANAGEMENT

- Gain feedback from all staff and stakeholders while it is still fresh in everyone's minds.

VENUE (IF RELEVANT)

- Set up a debrief meeting with the venue.
- Ensure the final bill tallies with expectations and authorizations on site.

SPEAKERS AND PERFORMERS

- Be sure to thank presenters and performers and to share any follow up information, such as session feedback and images.

EVENT TECHNOLOGY

- Run reports to analyze and measure the data provided from your eventtech.

MEETING DESIGN AND ENGAGEMENT

- Were the event objectives achieved?
- Send out a follow up survey to attendees.

BUDGET

- Finalize your budget, including any expenditure authorized during the live event.

VENDORS/SUPPLIERS

- Thank and gather feedback from all suppliers. Any learnings for future events?

- Report back on learnings and improvements you noted for future improvements.
- Check final invoices from vendors as received against budget projections.

STAFF

- Ask staff to record their observations, good and bad, and any suggestions for ways to do things differently at future events.
- Gather feedback from all parties.
- Set a date for the debrief meeting.

MARKETING AND COMMUNICATIONS

- If you promised attendees that further resources, presentations, images, and so forth would be made available share them quickly, within the timeframe promised.
- Update the newsletter and intranet as relevant.
- Work hard to continue the internal buzz, conversation and learning around the event.
- In case of important company news, consider issuing a post-event press release. Coordinate with the photographer any specific images you need to be turned around as priority, to issue alongside the press release.
- Coordinate your post event emails and communications. Notify attendees of the post event survey and where to access the resources as promised at the event.

MISCELLANEOUS

- Check off items as they arrive back at the office.
- Coordinate thank you cards and gifts, as appropriate.