

# Advanced Checklist for Corporate Event Planning - PUBLIC/EXTERNAL EVENTS -

This checklist is a guide for anyone planning events which are open to the public and people outside of the organization to attend.

This includes:

- User events and conferences
- Seminars
- Product launches
- Focus group
- Exhibiting - having a booth at a trade show
- Trade shows - running a public exhibition or having exhibitors present at your event
- Corporate hospitality and client entertaining

*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?
- 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 also other public events.
- How many people are expected to attend? What are the maximum and minimum numbers anticipated?
- Decide on the event name, even if it is a working title to begin with.
- Where will the event take place? Country? Region? City? Venue?
- 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?
- Is it a ticketed event? What is the anticipated ticket price?

## RESEARCH AND CONTRACTING

- Research potential destinations and venues to come up with a shortlist.
- Check venue availability and pricing.
- Organize site visits.
- Start creating a budget, adding in income and expenditure items. Estimate figures where necessary and replace with firm quotes as they are received.
- If it is a paying event experiment with different ticket prices and numbers. Work out the break-even position.
- Approach speakers, performers and special guests to check availability, fit with the event, interest in being involved, fees and expenses, before any dates are confirmed.
- Speak to sponsors, partners and other stakeholders to get them on board early.
- Start talking to vendors and getting prices and advice.
- Consider whether you will use internal or external AV. Discuss this with your venue before signing the contract and losing negotiating power.
- Negotiate terms and specifics with the venue.

- Ensure all the key people have the date blocked out in their diary.
- Coordinate accommodation room block and travel.
- Sign venue contract.
- Confirm ticket price and any specifics such as group booking discounts, early bird booking rates, maximum number of tickets available for purchase.
- 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.
- What time is access available for set up?
- When can the public access the venue?
- When must the venue be vacated?

## **BRANDING**

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

## **WEBSITE AND REGISTRATION**

- Set up the website and add details as they become available.

- Set up the online event registration process. Even if it is a free event it is useful to have a system to manage RSVPs and attendance.

## VENUE

- 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.

## CATERING

- Consider and confirm the event food and beverage.
- 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?

## SPEAKERS AND PERFORMERS

- Fully brief on the requirements, specifics and expectations of the event, including the audience profile.
- Discuss any expectations in terms of filming and photography.
- Sign contracts.
- 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 your speakers 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**

- Continually update your event budget headings, figures and ticket sales.
- Identify that you are on track in terms of sales targets or if extra efforts and focus is needed.

## **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.

## **AV AND PRODUCTION**

- Is access to scissor lifts, forklifts and other machinery required? Can this be arranged via the venue or does this need to be booked separately?
- 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 is large enough to accommodate podiums, tables, chairs, sofas, as required and safely.
- What is the cue system?
- Is there an autocue script?
- Who is the stage manager?
- 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.
- Ensure there is a switch and backup computer in case of any issues.
- Is there a comfort monitor to avoid the speaker or performer having to look behind them?

- Triple check the number and type of microphones and when mic changeovers will take place.
- When can the AV team have access for set up?
- What time must everything be ready?
- When are rehearsals and run throughs?
- 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

- Create your [event marketing plan](#).
- Set targets and milestones in terms of goals such as registration numbers, exhibitor sign ups, new followers, etc.
- Create personas to help you target marketing messages more effectively.
- Create your [social media plan](#).
- Research and check the preferred event hashtag is available.
- Set up social media profiles for the event.
- Create/update the bios, images, links to ensure they are up to date.
- Be active and share interesting and relevant content.
- What competitions and contests can be run?
- How can you increase brand loyalty through your pre event marketing and ideas to implement at the event?
- Will you be working with influencers?
- Create collateral and suggested tweets to make it easy for partners to share content.
- Encourage networking opportunities and connections prior to the event.
- Has the photographer and videographer been briefed 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?
- Will a press release be sent out before the event?

## **SPONSORSHIP AND INCOME**

- Identify potential sponsors and approach them early.
- Share details about the event and understand what they would get out of the event. Suggest ideas which will help them to achieve their business objectives. Be prepared to be flexible and responsive to their needs.
- Are additional revenue streams required? Are there opportunities for VIP upgrades, fringe events, sales, merchandise, selling access to content after the event, etc.
- Does additional budget need to be identified. Is this possible via different internal budgets? Who has authorization for that?

## **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?
- Does the venue provide florals in key areas?
- Do additional flowers need to be ordered?
- If it is a seated event consider the linen, table settings and centerpieces.

## **COMMUNICATIONS**

- What is the line of command?
- How will the team communicate onsite with each other?
- What is the quickest way to communicate with key personnel at the venue?
- How will any issues be escalated?

## **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.
- Notify the local authorities and agencies that the event is taking place as required and for large events establish multi-agency planning meetings.
- 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.
- What are the code words and procedures to deal with situations such as evacuation, fire, suspicious packages and so forth?
- Is a lost child/vulnerable person policy in place.
- Identify contingency plans.
- Create an overall event risk assessment.
- Share copies with the relevant people and venue.

## FINAL PREPARATION

- Send out final attendee 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.

## VENUE

- Check the number of chairs and layout.

- Check flipcharts, markers, post-it notes and so forth are ready in the relevant rooms.
- Test the WiFi login process.
- Ensure you have access codes to faster/gated WiFi if available.
- Test/check radio contact and mobile numbers for the key venue staff.
- Talk through key timings, such as cloakroom opening, refreshments being available, water being brought onto the stage.
- Check toilets are clean, fully operable and stocked with soap, toilet roll and hand towels.

## **CATERING**

- 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**

- 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 stage manager and AV team.
- 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 responsibilities as necessary.

## **MARKETING AND SOCIAL MEDIA**

- Send out communication to advise if tickets are available for purchase on the door and will remain on sale online for last minute bookings or what the cut off point is.

## **SPONSORSHIP AND INCOME**

- Ensure sponsors and key partners are met and greeted appropriately. Look after them throughout the event.
- Test card payment machines and ensure float is available for any cash sales.

## EVENT STYLING AND DECOR

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

## COMMUNICATIONS

- Sign out radios to relevant staff.
- Do radio checks.
- Ensure radios are signed back in after the event.

## 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.

## WEBSITE AND REGISTRATION

- If you promised attendees that further resources, presentations, images, and so forth would be made available add them quickly, within the timeframe promised.
- Update the website and registration page with details for the event next year.
- Consider opening early ticket sales right away for next year.

## VENUE

- 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 speakers 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.

## **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 SOCIAL MEDIA**

- Work hard to continue the buzz, conversation and learning around the event.
- Issue 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.
- Promote the date and venue for next years event.
- Let people know through all channels when tickets are on sale and post event collateral have been added.
- Share the highlights video.

## **SPONSORSHIP AND INCOME**

- Check in with sponsors to ensure they are happy and gain their feedback on the event.
- Share collateral and data.
- Discuss next years event and their future involvement.

## COMMUNICATIONS

- 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.