

The Ultimate Event Planning Checklist

Print off this checklist to help organize you for your upcoming event!



	Done	Person Responsible	Aprox. Hours To Complete	Due
4 - 6 Months Ahead of Event				
Establish your event goal and objective	<input type="checkbox"/>			
Select the date	<input type="checkbox"/>			
Identify venue and negotiate details	<input type="checkbox"/>			
Develop an event master plan	<input type="checkbox"/>			
Get cost estimates <input type="checkbox"/> Room Rentals <input type="checkbox"/> Food and Beverages <input type="checkbox"/> Equipment <input type="checkbox"/> Speaker Fees <input type="checkbox"/> Travel for staff Insurance	<input type="checkbox"/>			
Create an even budget	<input type="checkbox"/>			
Recruit an event committee	<input type="checkbox"/>			
Brand your event <input type="checkbox"/> Logo <input type="checkbox"/> Tagline <input type="checkbox"/> Website <input type="checkbox"/> Marketing material	<input type="checkbox"/>			
Create and launch publicity plan	<input type="checkbox"/>			
Identify and confirm speakers/ presenters/entertainers	<input type="checkbox"/>			



	Done	Person Responsible	Aprox. Hours To Complete	Due
Identify and contact sponsors/partners	<input type="checkbox"/>			
Determine if you need event registration software to make the process easier	<input type="checkbox"/>			
Determine if you need other event management software	<input type="checkbox"/>			
Release early-bird ticket	<input type="checkbox"/>			

3 - 4 Months Ahead of Event

Build out required documents for your team	<input type="checkbox"/>			
Speaker/presenter/entertainer liaison <input type="checkbox"/> Finalize presentation/speech topics <input type="checkbox"/> Get bio information, photo <input type="checkbox"/> Travel & accommodation arrangements <input type="checkbox"/> Have contract signed if appropriate <input type="checkbox"/> Ask speakers to start promoting and sharing it with their network	<input type="checkbox"/>			
Determine if you need event registration software to make the process easier <input type="checkbox"/> Determine registration fees <input type="checkbox"/> Set up and enable online registration <input type="checkbox"/> Finalize sponsor levels and amounts <input type="checkbox"/> Identify items to be unwritten and accounting track details	<input type="checkbox"/>			
Venue and logistics planning <input type="checkbox"/> Determine and arrange all details menu, A/V equipment, registrations set-up, parking, signage, etc. <input type="checkbox"/> Review security needs/plan for the event with venue manager <input type="checkbox"/> Investigate the need for any special permits, licenses, insurance, etc. <input type="checkbox"/> Assess accessibility requirements and communicate to staff	<input type="checkbox"/>			



	Done	Person Responsible	Aprox. Hours To Complete	Due
Follow publicity plan <input type="checkbox"/> Develop draft program <input type="checkbox"/> Create a draft event script <input type="checkbox"/> Develop publicity pieces <input type="checkbox"/> Request logos from corporate sponsors for online and printed materials <input type="checkbox"/> Develop and produce invitations, programs, posters, tickets, etc. <input type="checkbox"/> Develop media lists and prepare News Release, Media Advisory, Backgrounder, and all media kit materials <input type="checkbox"/> Enable/create an email event notification <input type="checkbox"/> Create a Facebook event page <input type="checkbox"/> Develop a promo video and post it on YouTube and your Facebook page <input type="checkbox"/> Register your event on a variety of online event calendars <input type="checkbox"/> Create some buzz on your blog or member forums <input type="checkbox"/> Determine VIPs and create invitation & tracking document <input type="checkbox"/> Order any desired event swag	<input type="checkbox"/>			

1 - 2 Months Ahead of Event

Send reminders to your contact list regarding registration and participation	<input type="checkbox"/>			
Reach out again to presenters/ speakers regarding <input type="checkbox"/> Confirming travel and accommodation details <input type="checkbox"/> Request copy of speeches and/or presentations	<input type="checkbox"/>			
Sponsorship finalization <input type="checkbox"/> Follow up to confirm sponsorships and underwriting <input type="checkbox"/> Get any promotional materials you ll be sharing at the event <input type="checkbox"/> Ask sponsors to share event on their promotional channels	<input type="checkbox"/>			



	Done	Person Responsible	Aprox. Hours To Complete	Due
Continue executing on your publicity plan	<input type="checkbox"/>			
<input type="checkbox"/> Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.				
<input type="checkbox"/> Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.				
<input type="checkbox"/> Post more details about your event on social media				
Close early-bird tickets	<input type="checkbox"/>			
Finalize and proofread printed materials	<input type="checkbox"/>			
1 Week Ahead of Event				
Have all committee chairs meet and confirm all details against Master Plan	<input type="checkbox"/>			
Finalize event script	<input type="checkbox"/>			
<input type="checkbox"/> Ensure it includes wheelchair-accessible areas and has clear paths through the venue				
Brief any/all hosts, greeters, volunteers about their event duties and timelines	<input type="checkbox"/>			
Finalize your seating plan	<input type="checkbox"/>			
Provide final registration numbers to caterer	<input type="checkbox"/>			
Make print and online copies of any speeches, videos, and presentations	<input type="checkbox"/>			
Do a final registration check, including name badges & registration list	<input type="checkbox"/>			
Determine photo op and interview opportunities with any presenters & VIPs.	<input type="checkbox"/>			
Confirm details with media attendees	<input type="checkbox"/>			



	Done	Person Responsible	Aprox. Hours To Complete	Due
1 Day Before The Event				
Have all committee chairs meet and confirm all details against Master Plan	<input type="checkbox"/>			
Finalize event script	<input type="checkbox"/>			
<input type="checkbox"/> Ensure it includes wheelchair-accessible areas and has clear paths through the venue				
Brief any/all hosts, greeters, volunteers about their event duties and timelines	<input type="checkbox"/>			
Finalize your seating plan	<input type="checkbox"/>			
Provide final registration numbers to caterer	<input type="checkbox"/>			
Make print and online copies of any speeches, videos, and presentations	<input type="checkbox"/>			
Do a final registration check, including name badges & registration list	<input type="checkbox"/>			
Determine photo op and interview opportunities with any presenters & VIPs.	<input type="checkbox"/>			
Confirm details with media attendees	<input type="checkbox"/>			
Event Day!				
Take a few deep breaths — you got this!	<input type="checkbox"/>			
Ensure you have copies of all instructions	<input type="checkbox"/>			
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Check-in with each Committee Chair to ensure their team is on track	<input type="checkbox"/>			
Greet new attendees	<input type="checkbox"/>			



	Done	Person Responsible	Aprox. Hours To Complete	Due
Post Event Follow-Up				
Ensure nothing was left behind at the venue	<input type="checkbox"/>			
Financial Status <input type="checkbox"/> Gather all receipts and documentation, final registration data, etc. <input type="checkbox"/> Update budget	<input type="checkbox"/>			
Send thank-you's and acknowledgement letters to <input type="checkbox"/> Sponsors <input type="checkbox"/> Volunteers <input type="checkbox"/> Speakers/presenters <input type="checkbox"/> Donors <input type="checkbox"/> The media	<input type="checkbox"/>			
Post-event publicity <input type="checkbox"/> Send out an email to your subscriber base with highlights from the event <input type="checkbox"/> Make a publicity reel video <input type="checkbox"/> Share highlights on social media <input type="checkbox"/> Update website page to reflect that it's a past event	<input type="checkbox"/>			
Conduct a post-event survey	<input type="checkbox"/>			
Reach out to event participants	<input type="checkbox"/>			
Conduct a team debrief to learn their thoughts	<input type="checkbox"/>			
Conduct a thorough evaluation of the event	<input type="checkbox"/>			

We hope you found this checklist helpful in getting started with event planning. Use this as a starting point to identify or assign activities to various volunteers or staff; or print this off so you can literally check-off items as they are assigned or accomplished.

