

B2B Event Planning Checklist

Phase	Checklist Item	Details / Actions	
Pre-Budget Foundation	Define event objectives	Lead gen, brand awareness, etc.	
	Identify KPIs	Cost per lead, ROI, conversion rate	
	Understand target audience	Buyer personas, roles, industries	
	Estimate headcount	Paid, VIP, internal, press	
	Review past event data	Pull past budget vs. actual	
	Choose budget tool/software	eg; Eventify	
Expense Planning	Separate fixed vs. variable	Categorize all costs	
	List fixed expenses	Venue, AV, insurance, etc.	
	List variable expenses	Catering, gifts, speaker fees	
	Include hidden costs	Labor, shipping, etc.	
	Allocate contingency	10-15% buffer	
Revenue Forecasting	Project ticket revenue	Early bird, VIP, groups	
	Estimate sponsorship income	Tiered sponsor packages	
	Add exhibitor/stall fees	Booth or partner revenue	
	Use revenue tracking tools	Live income tracking	
Vendor Management	Get multiple quotes	Minimum 3 per service	
	Negotiate inclusions	Bundle AV + tech + support	
	Define payment terms	Track deposits, invoices	
	Finalize vendors early	Secure pricing early	
Budget Allocation	Create line-item budget	What, how much, priority	
	Categorize by department	Marketing, ops, etc.	
	Set must-have vs nice-to-have	For cost-cutting later	
	Build approval workflows	Internal signoff process	
Tracking & Monitoring	Track expenses in real-time	eg; Eventify	
	Monitor budget vs. actual	Weekly variance checks	
	Assign owner per category	Accountability in spend	
	Sync with finance team	Aligned reconciliation	
Post-Event Analysis	Final budget reconciliation	Invoices vs estimates	
	ROI analysis	Goals met vs spend	
	Document learnings	Budget learnings	
	Prepare next event template	Re-usable framework	