



# The Complete Event Planning Checklist

A step-by-step planning checklist to guide your event from initial strategy to post-event optimization.

## 6-12+ Months Before

Strategy, Scope & Foundation

### Strategy & Goals

- Define primary event purpose (revenue, education, pipeline, community, brand)
- Align event with broader organizational goals
- Establish measurable KPIs and success metrics
- Define ROI expectations

### Budget & Finance

- Build high-level budget forecast
- Identify fixed vs. variable costs
- Assign financial owners
- Define approval and procurement processes
- Set contingency buffer

### Audience, Content & Experience

- Define attendee personas (attendees, sponsors, exhibitors)



- Outline attendee journey from registration to follow-up
- Determine high-level format (conference, expo, hybrid, etc.)
- Decide content formats (keynotes, panels, workshops, networking)

#### Marketing & Registration

- Identify primary marketing channels
- Define ticket types and pricing tiers
- Determine early-bird strategy (if applicable)
- Outline registration flow and timeline

#### Audience, Content & Experience

- Shortlist and evaluate venues
- Conduct feasibility checks (capacity, availability, costs)
- Research AV, catering, production, GSCs
- Research event technology vendors
- Review vendor lead times and dependencies



### Technology & Data

- Define core tech requirements (registration, badges, app, check-in)
- Determine required data capture fields
- Outline reporting needs
- Identify CRM/AMS/marketing integrations

### Calls for Speakers (If Applicable)

- Define speaker selection criteria
- Draft and launch call for proposals
- Invite anchor or high-profile speakers
- Establish review committee and process

## 4-9 Months Before

Commitment & Infrastructure

### Strategy & Budget

- Confirm final scope and scale
- Lock budget allocations
- Confirm internal approval workflows



### Audience & Content

- Confirm agenda framework
- Define session tracks
- Continue speaker recruitment and confirmations

### Marketing & Registration

- Build and publish event website
- Open registration
- Launch promotional campaigns
- Coordinate sponsor promotion assets

### Vendors & Operations

- Finalize venue contract
- Confirm catering details
- Lock AV, staging, and production partners
- Finalize sponsorship and exhibitor packages
- Confirm event technology vendors



## 2-3 Months Before

Experience Design & Demand Generation

### Technology & Data

- Implement event platform
- Configure registration workflows
- Design badge templates
- Begin mobile app configuration

### Audience & Content

- Finalize speaker roster
- Confirm session topics and timing
- Collect speaker assets (bios, headshots, slides)
- Enable networking and matchmaking features

### Marketing & Registration

- Scale email campaigns
- Announce key speakers and sponsors
- Activate paid ads and retargeting
- Monitor registration pacing



### Vendors & Operations

- Begin detailed floor plan planning
- Coordinate sponsor/exhibitor deliverables
- Confirm production timelines

### Technology & Data

- Test attendee-facing features
- QA registration and confirmation emails
- Validate reporting dashboards

## 1-2 Months Before

Experience Design & Demand Generation

### Content & Agenda

- Lock final agenda
- Assign moderators and room leads
- Confirm presentation requirements

### Logistics & Onsite Operations

- Confirm AV per room
- Finalize catering menus and dietary counts



- Lock signage and wayfinding
- Confirm staffing schedules
- Build detailed run-of-show

## 1-2 Weeks Before

Final Prep & Risk Management

### Communications

- Send final attendee instructions
- Push mobile app download messaging

### Testing & Training

- Conduct speaker tech rehearsals
- Test AV, livestream, Wi-Fi backups
- Train staff and volunteers
- Test check-in and badge printing

### Materials & Vendors

- Print badges and materials
- Confirm vendor load-in schedules
- Confirm emergency and escalation contacts



### Contingency Planning

- Identify backup speakers
- Confirm internet redundancy
- Review onsite issue protocols

## During The Event



### Operations & Flow

- Monitor registration/check-in throughput
- Track session timing
- Manage room transition
- Resolve crowd flow issue

### Experience & Engagement

- Support speakers and exhibitors
- Encourage networking and app engagement
- Send real-time announcements

### Data Capture

- Monitor attendance tracking
- Validate badge scans and lead retrieval
- Track engagement metrics



## 1-3 Days After

Follow up & Feedback

### Communications

- Send thank-you emails
- Share recordings and resources
- Send post-event survey

### Finance & Close-Out

- Begin vendor invoicing
- Reconcile initial expenses

## 1-2 Weeks After

Optimization & Future Planning

### Reporting

- Analyze attendance and engagement metrics
- Review marketing performance
- Deliver sponsor and exhibitor reports

### Internal Review

- Conduct team debrief
- Document lessons learned



## 30+ Days After

### Optimization & Future Planning



#### Performance Review

- Measure ROI vs. original KPIs
- Evaluate budget performance

#### Optimization

- Repurpose content into marketing/sales assets
- Implement attendee and stakeholder feedback
- Update planning timeline and documentation

#### Future Planning

- Begin early venue sourcing (if recurring event)
- Secure hold dates if applicable

## ✦ Ready to Get Started?

Planning an event is complex, but the right systems make it manageable. PheedLoop is an all-in-one event management platform designed to support every phase of your event lifecycle, from registration and badges to engagement and post-event reporting.

Learn more about how we power modern events at [pheedloop.com](https://pheedloop.com).