The Ultimate **Event Technology Checklist**

A Comprehensive Guide to Evaluating Event Management Software Platforms

1 Platform Foundations & Core Infrastructure

System Architecture

- ☐ All-in-one centralized platform
- ☐ Single source of truth for event data
- ☐ Multi-event management
- ☐ Cloud-based access
- ☐ Customizable workflows
- ☐ Flexible data structure
- ☐ Automation capabilities

User & Team Management

- ☐ Role-based permissions
- ☐ Department/team access controls
- ☐ Volunteer/staff roles

- ☐ Audit logs
- ☐ Collaboration tools
- ☐ Approval workflows

Integrations & Data

- ☐ Open API access
- ☐ CRM integrations
- ☐ Marketing automation integrations
- ☐ Payment gateways
- ☐ Accounting integrations
- ☐ SSO capabilities
- ☐ Data import/export tools

② Event Planning & Project Management

- ☐ Event website builder
- ☐ Custom landing pages
- ☐ Budget tracking tools
- ☐ Task trracking & timelines
- ☐ Vendor coordination tools
- ☐ Venue/resource planning
- ☐ Goal/KPI tracking
- ☐ Event templates & cloning
- ☐ Internal notes & documentation

③ Call for Speakers, Abstracts & Content Management

Submission Management

- ☐ Call for proposals/speakers portal
- ☐ Custom submission forms

☐ File uploads & attachments

☐ Automated submission confirmations

☐ Submission editing workflows

Review Process

☐ Reviewer assignments

☐ Blind review options

☐ Scoring & evaluation tools

☐ Reviewer dashboards

☐ Acceptance workflows

☐ Automated acceptance/rejection emails

Speaker Management

☐ Speaker onboarding portals

☐ Bio/headshot management

☐ Speaker contracts & agreements

☐ Presentation uploads

☐ Session auto-generation from submissions

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4 Registration, Ticketing & Payments

Registration Experience

- ☐ Custom registration forms
- ☐ Conditional logic fields
- ☐ Multi-step registration flows
- ☐ Group registrations
- ☐ Delegated registrations
- ☐ Approval-based registrations
- ☐ Waitlists & capacity controls

Ticketing & Pricing

- ☐ Tiered pricing
- ☐ Early bird pricing
- ☐ Promo codes & discounts
- ☐ Member pricing
- ☐ Bundle packages
- ☐ Add-ons & upsells

Payment & Finance

- ☐ Secure payment processing
- ☐ Multiple currencies
- ☐ TAX/VAT/GST handling
- ☐ Invoice generation
- ☐ Refund management
- ☐ Financial reporting

⑤ Agenda, Session & Program Management

- ☐ Drag-and-drop scheduling
- ☐ Track/category organization
- ☐ Room assignments
- ☐ Session capacity limits
- ☐ Conflict detection
- ☐ Speaker-session linking

- ☐ Session registration
- ☐ Schedule personalizing
- ☐ Live schedule updates
- ☐ Automated website/app updates

⑥ Attendee Experience & Mobile Event Apps

Core App Features

- ☐ Personalized schedules
- ☐ Session browsing
- ☐ Speaker profiles
- ☐ Venues maps & floorplans
- ☐ Exhibitor directories
- ☐ Sponsor listings

Engagement Tools

- ☐ Networking matchmaking
- ☐ Attendee messaging
- ☐ Live polls
- ☐ Q&A tools
- ☐ Surveys & feedback
- ☐ Social feeds
- ☐ Gamification
- ☐ Push notifications

Personalization

- ☐ AI recommendations
- ☐ Saved sessions
- ☐ Custom attendee interests
- ☐ Behavioral targeting

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7 Exhibitor & Sponsor Management

Exhibitor Tools

- ☐ Exhibitor onboarding portals
- ☐ Booth selection tools
- ☐ Exhibitor profiles
- ☐ Product listings
- ☐ Lead retrieval apps
- ☐ Exhibitor analytics dashboards

Sponsor Management

- ☐ Deliverable tracking
- ☐ Sponsored session management
- ☐ Banner placements
- ☐ Sponsored push notifications
- ☐ Sponsor ROI reporting

8 Marketing, Communications & Promotion

- ☐ Email marketing tools
- ☐ Automated reminders
- ☐ Audience segmentation
- ☐ Registration conversion tracking
- ☐ Referral programs
- ☐ Social sharing tools
- ☐ Website analytics
- ☐ Camapign reporting dashboards
- ☐ SMS messaging (if applicable)

9 Onsite Event Operations & Logistics

Check-In & Access

- ☐ QR code check-in
- ☐ Self-serve kiosks
- ☐ Mobile check-in apps

- ☐ Badge printing
- ☐ Access control rules
- ☐ Session scanning

Operations Management

- ☐ Real-time attendance tracking
- ☐ Staff dashboards
- ☐ Incident tracking
- ☐ Live announcements
- ☐ Queue monitoring
- ☐ Capacity alerts

10 Virtual & Hybrid Event Capabilities

- ☐ Live streaming integrations
- ☐ Virtual session rooms
- ☐ Hybrid attendee management
- ☐ Virtual exhibitor booths

- ☐ Online networking tools
- ☐ Chat & reactions
- ☐ On-demand content libraries
- ☐ Remote speaker tools
- ☐ Hybrid attendance tracking

11 Analytics, Reporting & Post-Event Insights

- ☐ Real-time dashboards
- ☐ Registration analytics
- ☐ Attendance reporting
- ☐ Session engagement metrics
- ☐ Sponsor ROI reporting
- ☐ Lead retrieval exports
- ☐ Financial reports
- ☐ Survey analysis
- ☐ Engagement scoring
- ☐ Historical event comparisons

12 Security, Compliance & Reliability

- ☐ Data encryption
- ☐ GDPR/PIPEDA compliance
- ☐ Privacy controls
- ☐ Access logs
- ☐ Backup & disaster recovery
- ☐ Platform uptime guarantees

13 Vendor Support & Implementation

- ☐ Onboarding support
- ☐ Dedicated account manager
- ☐ Training resources
- ☐ Knowledge Base
- ☐ Live chat support
- ☐ Implementation consulting
- ☐ Migration assistance
- ☐ Strategic planning support

✦ 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**.