GUIDEBOOK

The Ultimate Event Planning Checklist

Everything you need to plan with confidence and impress attendees





Managing events can be stressful. You need an event planning checklist to support you from beginning to end. Guidebook's got you covered!

The checklist is divided into three sections:

- Pre-event planning
- On-site setup and during the event
- Post-event management

Use this event planning checklist to kickstart your planning process. Since no two events are the same, you'll likely want to remove or add items. Tailor your checklist to fit your event.

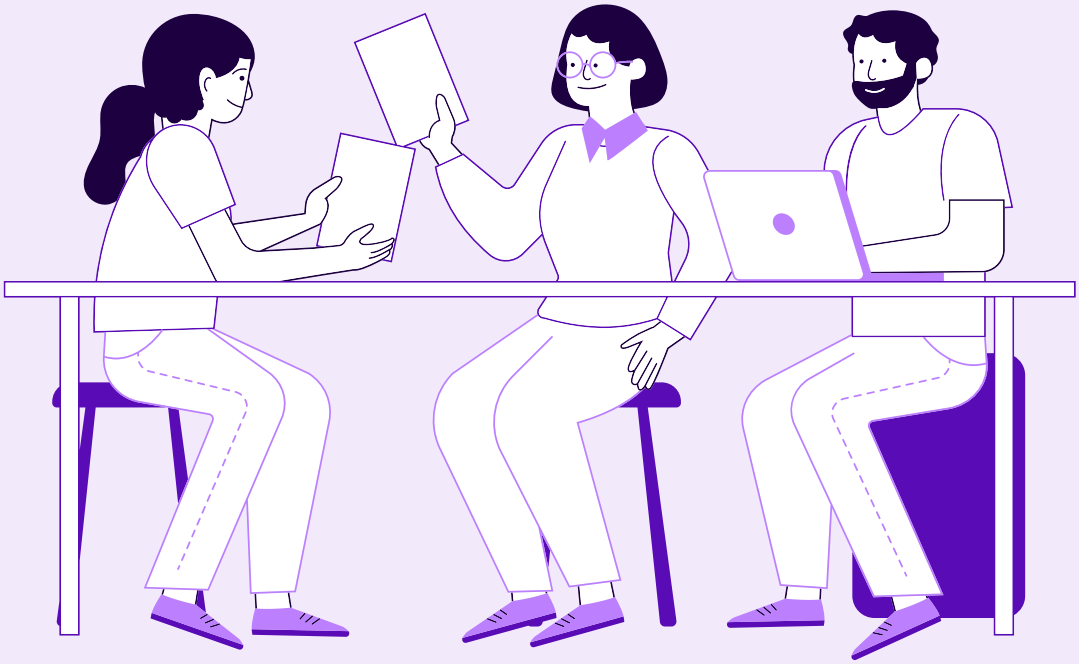
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Pre-Event Planning



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Getting Started

Kick-off by laying your foundation! For large events like user conferences, festivals, or trade shows, you'll want to start this process 12+ months in advance. On the other hand, for smaller events, like meetings and workshops, getting the ball rolling 5-6 months ahead of time is perfect.



Things to keep in mind

- What is the purpose?
- What does success look like, and how will you measure it?
- When and where will the event take place?
- How many people are expected to attend?
- What budget is available for the event?
- Is this a ticketed event? What is the ticket price?

Research and Vendor Contracting

- Shortlist potential venues.
  - Think about your attendee flow.
  - Will there be breakout sessions?
  - Different rooms for food and beverages?
  - Where will your sponsors be?
- Check venue availability and pricing, including food, beverage, wifi, AV, and parking costs. Identify negotiation points.
- Create a budget with estimated income and costs, updating it as final numbers come in.
- Consider offering discount tickets, such as early bird or student discounts.
- Secure paid speakers, performers, or special guests. Start contract negotiations.
- Determine what topics will be presented and discussed.
- Negotiate terms with the venue.
- Arrange accommodation and travel.
- Obtain legal and senior management approval.
- Sign contracts with the venue and vendors.

Team and Project Management

- Identify your team and their roles.
- Allocate specific tasks and action items as required.
- Define key milestones and deadlines for each department from Content, sponsorship, sales & marketing, Operations, and more
- Build out processes, including communication, reporting, and meetings.



Event Program

- Define your event structure and agenda. Will there be a single session, a full day with a single track, or multiple tracks running at the same time?
- Think about ways to maximize learning and goals.
- Think about the content - what are the key challenges people need to address?
- Why will people attend your event? What takeaways will they be able to implement?
- Do your primary and secondary market research.
- Ensure there are enough breaks and downtime throughout the event.
- Consider delivery, engagement, and room layout.
- Can event technology support the meeting objectives?
- Consider how effectiveness and outcomes will be measured.

Budget

- Keep track of your budget in an organized spreadsheet.
- Be sure to update figures as planning evolves
- Use a template that makes it easy for you to have a great event without going over budget. We created one for you below!
- Keep track on how much revenue your sponsors and tickets are creating.
- Are you on target with spending and revenue?
- Do you need to re-forecast? How can you change strategies to ensure you are hitting your goals?



Stay on track with our FREE budget template!

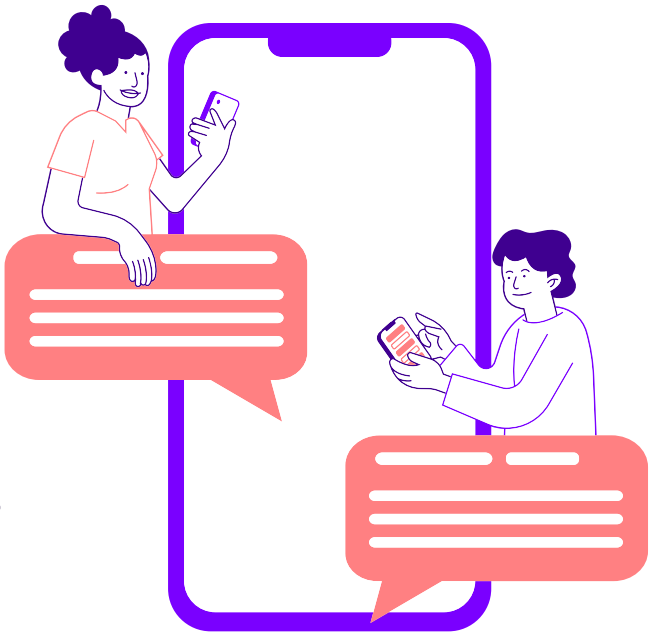
Download The Budget Template

Venue

- How will your space be used? Create layouts and room allocations for your event.
- What are specific unloading, load in/load out, parking, and goods lift information that should be shared with staff, exhibitors, and vendors?
- Does the venue have machinery available to aid with the setup?
- 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 the day of the event.
- Test WiFi bandwidth. Upgrade or find alternatives if required.
- Ensure there is a good flow of foot traffic throughout the event.
- Make sure you use signage and information to help people understand where they are meant to be.

Event Technology

- Research event tech to incorporate into your event.
- Book demos and get quotes from potential providers.
- Shortlist and choose solutions.
- Train staff on your technologies.
- Set up event tech tools.
- Implement the event tech.
- Communicate and promote tech to attendees.
- Provide support and encouragement to maximize
  ROI on the technology.



Website and Online 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.
- Will you have early bird tickets? How will you communicate price increases?
- What information do you need to gather at registration? Make it easy for people to register

Event App

- Research event app builders.
- Choose the platform that offers all the features you need for the best price.
- Gather and upload content like speaker info, venue maps, schedules, and more.
- Publish your app to the app stores so it is available for download a few weeks before your event.

Speakers and Entertainment

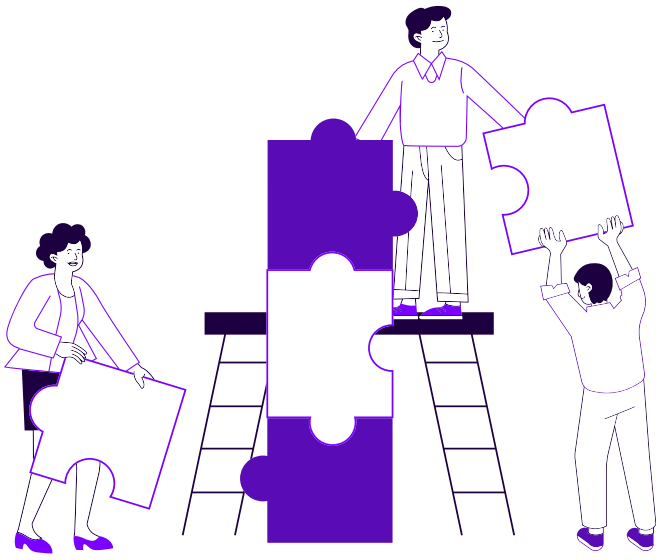
- Speakers and Entertainment
- Provide speakers with details and guidelines on the specifics of their session.
- Set deadlines for content.
- Gather headshots and bios to include on the app or website.
- Share details of any AV or event tech to be used.
- Book travel and accommodation as required.
- Outline arrival and departure times.
- Confirm rehearsal timings.
- Confirm contact numbers.
- Send out speaker information so everyone knows where to be and when
- Ensure speakers know where to send there slide decks and information too and by when
- Do speakers need to be mic'd up?

AV and Production

- 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, and sofas, as required and safely.
- What is the cue system?
- Is there an autocue script?
- Who is the stage manager?
- Carefully review and QA all presentations, graphics, and visuals and link them all together.
- Ensure there is a 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?

Event 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 that is the protocol?
- Are staff clear about the dress code?
- Specific timings, roles, and responsibilities should be agreed upon in advance.



Food and Beverage

- Consider and confirm the event's food and beverage needs.
- Agree on catering timings and service.
- Confirm final catering numbers and dietary requirements.
- Finalize arrangements for staff, crew, and VIP catering.
- Agree on your final catering numbers
- Check with the catering team how long they need notice if there are short timing changes
- Run through the full F&B timings

Branding

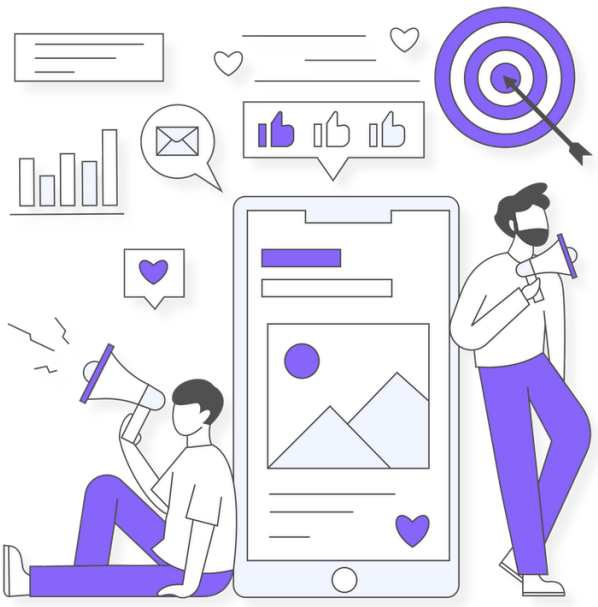
- Is there a theme for the event? If so how will this flow through the event?
- How can you create impact, wow factor, and photo opportunities within the event?
- What is your conference USP?
- Why will people attend?
- How will you portray sponsors, media, speakers?
- If it is a seated event consider table decor.
- What opportunities are there for branding and signage across the event?
- What are the specific formats and deadlines for items, for instance, digital signage?

Vendors

- 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.
- Ensure all vendors know where they need to be?
- If they are shipping items to the event, make sure they have the correct labels.

Marketing and Social Media

- Create a marketing a promotion plan.
- Set targets and milestones for your goals, including registration numbers, new followers, etc.
- Research and create an event hashtag.
- Be active and share interesting and relevant content leading up to the event.
- How can you increase brand loyalty through your pre-event marketing and ideas to implement at the event?
- Will you be working with influencers?
- Can your speakers and sponsors promote the event to their audiences?
- Create collateral and suggested tweets to make it easy for partners to share content.
- Encourage networking opportunities and connections prior to the event.
- Have 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?



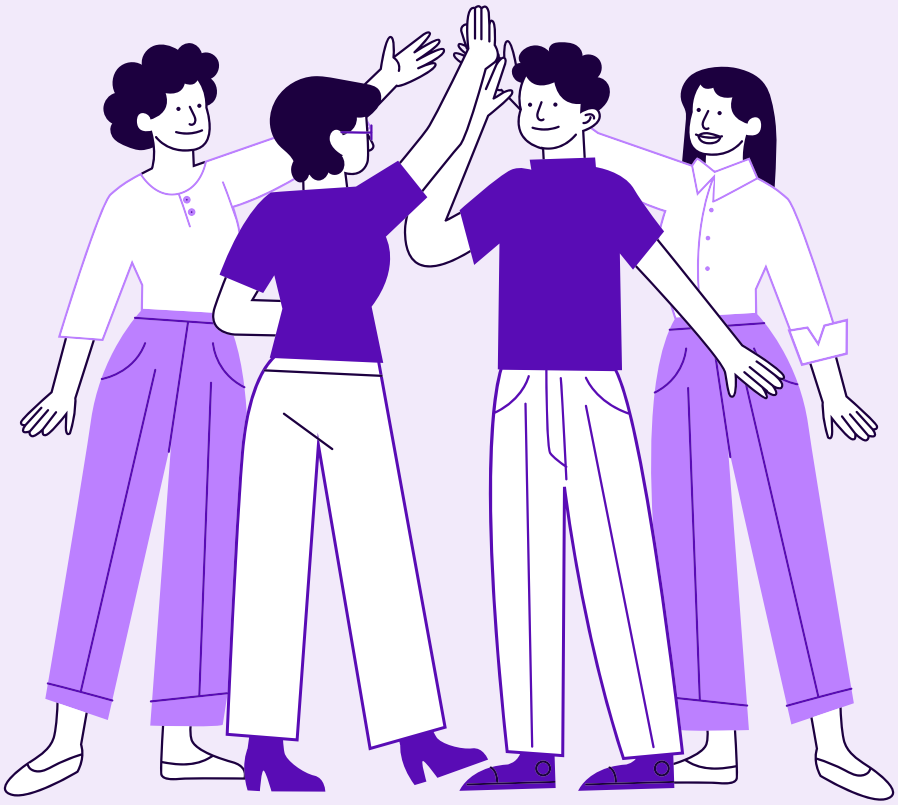
Sponsorships and Exhibitors

- Identify potential sponsors and approach them early with a strong event proposal.
- Share details about the event and understand what they would get out of the event. Suggest ideas that will help them to achieve their business objectives. Be prepared to be flexible and responsive to their needs.
- **Learn how you can earn revenue through Guidebook's in-app sponsorship feature in this ebook.**
- Create opportunities for additional income through VIP upgrades, fringe events, sales, merchandise, selling access to content after the event, etc.
- If you have exhibitors at your event, ensure that you create an exhibitor manual and clearly communicate 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

- Get the relevant permits and licenses in place.
- Notify the local authorities and agencies that the event is taking place as required, and establish multi-agency planning meetings for large events.
- Ensure adequate insurance coverage is in place for the event.
- Arrange security procedures for entering and exiting the event.
- Check risk assessments, method statements, and insurance documents from vendors, exhibitors, performers, etc.
- Identify any specific risks.
- Establish code words and procedures to deal with situations such as evacuation, fire, and suspicious packages.
- Put together a child or vulnerable person policy.
- Identify contingency plans.
- Create an overall event risk assessment.
- Share copies with the relevant people and venue.

On-Site Setup and During the Event



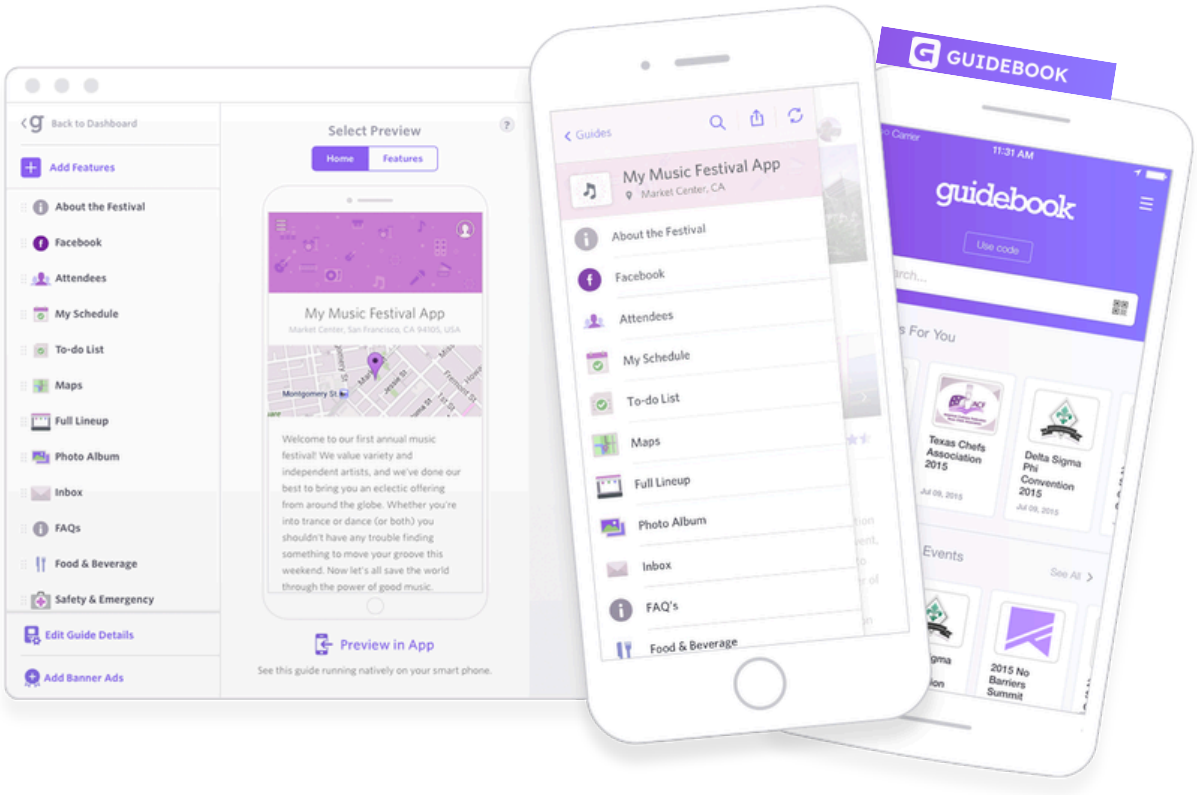
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Event Program

- 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.

Event App

- Offer **personalized schedule** options to help attendees feel organized
- Send **push notifications** to keep your attendees in the loop
- Create **interactive maps** so your attendees can find their way around confidently
- Share **live polls** to get real-time engagement and feedback
- Organize all your event resources in one **centralized hub**



Website and Registration

- Add final messages and updated contact details to the website.
- Advice on the website and registration site if tickets are available for purchase at 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.
- Give staff members meeting locations for VIP escorting.
- Notify the relevant staff when key people arrive so they are ready to receive them.
- Test barcode scanners/tablets used for check-in.
- And if you are printing badges on-site, do a test before the public arrives.

Food and Beverage

- 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 backstage.
- If there is a surplus of food in any area, make arrangements to donate it to those in need.

Vendors

- Check in with all suppliers to make sure they are ready on time and there are no issues to report.

Venue

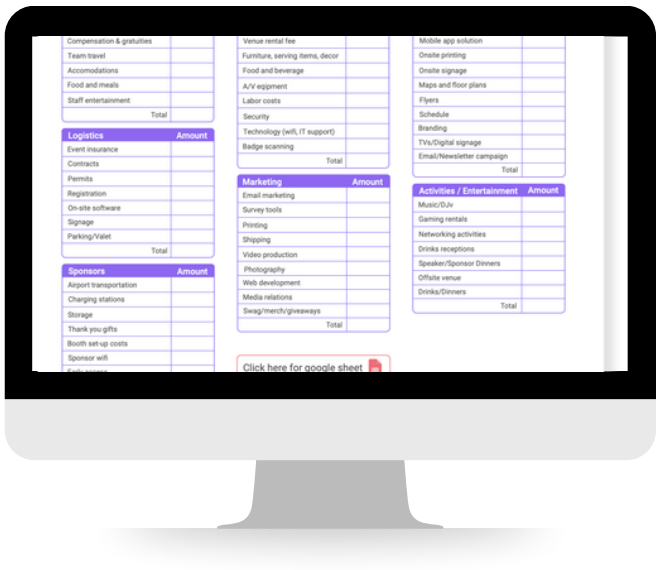
- Conduct a final walkthrough to ensure everything is in place and looks as it should.
- Test the WiFi login process.
- Test/check radio contact and mobile numbers for the key venue staff.
- Talk through key timings, such as sponsor exhibition opening and refreshments being available.
- Check toilets are clean, fully operable, and stocked with soap, toilet rolls, and hand towels.

Speakers and Entertainment

- Check sound, lighting, presentations, video, cues, and technology during the rehearsal/ briefing.
- Agree on specifics such as cues, signals, who will collect from the green room, and so forth.
- Tick off speakers and performers as they arrive.

Budget

- Add any last-minute items to your spreadsheet
- Track any changes to expenses



Stay on track with our FREE budget template!

Download The Budget Template



Event Tech 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 event tech, etc.

Staffing

- If there are any hold-ups/absences in terms of staff re-allocate responsibilities as necessary.

Social Media

- Post live updates to social media channels.
- Monitor social media activity by tracking usage of your event hashtag, check-ins to the venue, and brand mentions.
- Retweet or share compelling posts from attendees.

Sponsors and Exhibitors

- Ensure sponsors and key partners are met and greeted appropriately. Look after them throughout the event.
- If they are leaving any items for collection the next day, ensure they label the items correctly and store them in the right place, ready for future collection.

After the Event



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Survey

- Send out a survey to gain feedback from all staff and stakeholders while it is still fresh in everyone's minds.

Digital Resources

- Make resources like presentations, images, and more available in the app after the event.
- Update the website and registration page with details for the event next year.
- Consider opening early ticket sales right away for next year.

Event Technology

- Run reports to analyze and measure the data provided by your event tech.
- Send out a survey to gather feedback from attendees.
- Your Guidebook app automatically creates visualized reports and the survey feature is built in.



Venue

- Set up a debrief meeting with the venue.
- Ensure the final bill tallies with expectations and authorizations on site.

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 an event to debrief and plan improvements for next year.

Budget

- Finalize your budget, including any expenditure authorized during the live event.

Vendors

- Thank you 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.

Sponsors and Exhibitors

- Ask sponsors for feedback and ensure they are happy.
- Share collateral and data.
- Discuss next year's event and their future involvement.

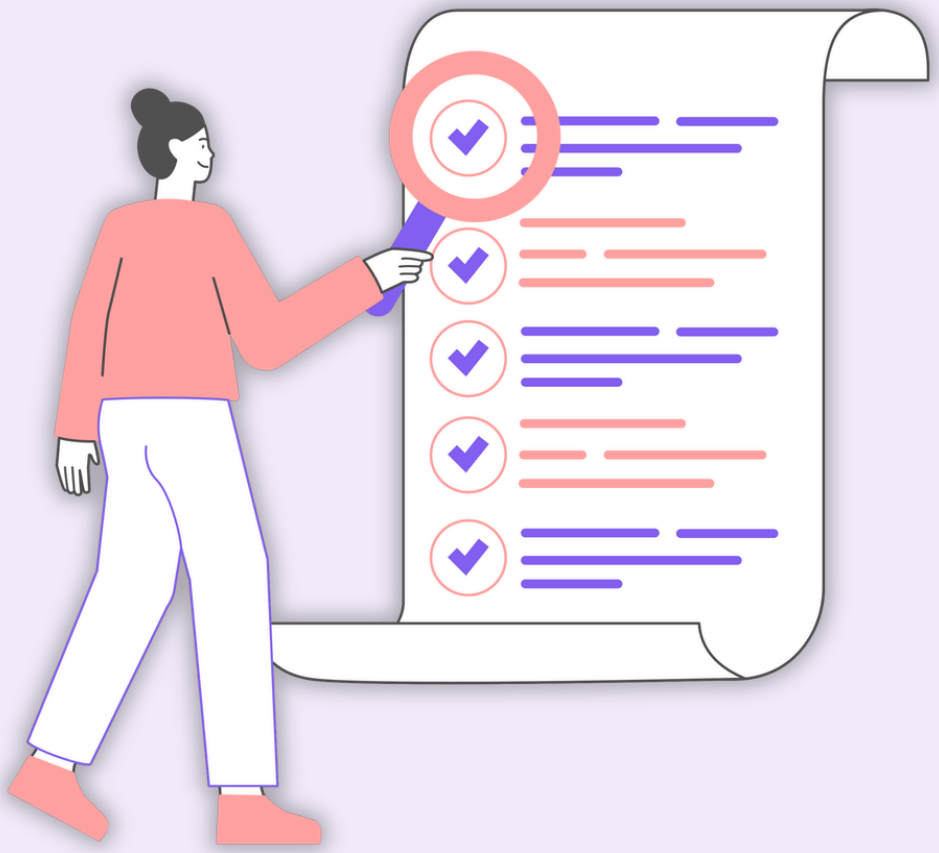
Social Media

- 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 issue alongside the press release.
- Promote the date and venue for next year's event.
- Let people know through all channels when tickets are on sale and post-event collateral has been added.
- Share the highlights video.

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.
- Coordinate thank you cards and gifts, as appropriate.
- Communicate to the wider business the success of. the event, key learnings/takeaways.





It’s over - now what?

Congrats on your successful event! You’ve completed all the planning, tracking, editing, and executing. It’s time to unwind.

And when you’re ready to plan the next event, we’re ready to support you.

Got questions? Talk to a product expert:

hello@guidebook.com **(888) 733-3942**

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