Checklist event planning

Step 1: Event goals

- ☐ **What is the core goal of the event?** (e.g. information/ customer acquisition and loyalty/ motivation/ networking…)

- ☐ **Who will be attending the event?** (e.g, employees/ customers/ partners, executives…)

- ☐ **What is the specific goal of the event?** (e.g. partners should be informed about the new strategic direction, customers should get to know new products…)

2. Event concept

- ☐ What is the available budget?

- ☐ Will the event be planned and organized in-house or with support from an agency?

- ☐ Conception with the help of an event management software?

- ☐ Would partner companies like to participate in the event (as sponsors, exhibitors, in presentations etc.)?

- ☐ About how many people will be attending?

- ☐ What dates would be ideal? (Please note: Trade fairs, holidays, competing events, the availability of important participants, the event's size and scope (large meetings require longer preparation times than small ones!) etc. must be taken into account in your planning)

- ☐ Will the meeting last for one day or several?

- ☐ How should the event's content be developed and communicated?
  - o Internal and/or external speakers
  - o Presenter
  - o Workshops
  - o Panel discussions
  - o Exhibition
  - o Interactive meeting formats

- ☐ How will the event be structured?
  - o Only a plenary session?
  - o Workshops? If so, how many?
  - o Seating arrangements?
  - o Exhibitions?
  - o Get-together areas?
  - o Catering?

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- An additional evening event (an extra room or a rearranged space?)
- Technical equipment

☐ What are the precise requirements for the destination?

- Where will the participants be coming from?
- Must it be close to an airport?
- What are the transport connections/accessibility like?
- Does the destination have the necessary infrastructure (e.g. hotels, restaurants, venues, public transport…)?

☐ What would be the ideal destination?
- Is there a city/ region that is known for ist industry focus?
- Should the participants get to know a company location?
- Should the participants get to know a new destination?
- Where has this meeting been held in the past?
- Should it be a rural or an urban destination?

☐ What location should you choose?

- Type of location (a hotel or an unusual event location that communicates a message/a theme?)
- Requirements for the location (premium or basic, number of stars etc.)
- Available facilities — are they suitable for the number of participants and the event's structure, timetable and requirements (e.g. plenary sessions or workshops)?
- Are additional spaces needed (e.g. for an exhibition, a reception, lunch/dinner, coffee breaks)

☐ Must overnight accomodation be available?

- If the meeting is held at an event location, you may need to reserve hotel accomodation nearby.
- Upgrades for VIPs

☐ Will transfers or shuttles be needed for groups or individual participants?

- From the airport or train station
- From the hotel

☐ How should the participant management and the overall communication, from the invitations to the feedback questionnaire, be organized?

- Does a motto/key visual/central theme already exist, or must it still be developed?
- Should a corporate design be taken into account?
- Which aspects should be analogue, which should be digital?
- Would an event website and/or an event app with information about the event be desirable?

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o   How should the participant management be carried out?

3. Event planning & calculation

Please note: As you carry out your research concerning the initial concept, focus on the basic cornerstones that will determine the meeting's success, such as the location and compelling content. At this point, certain details such as the choice of a menu or the floral decorations are not yet significant, as a rule.

- ☐ Carry out research to find the location that best fits the event profile (hotel, event location) in the destinations you've decided on

- ☐ Carry out research on content that matches the event profile (speakers, programme, additional content).

- ☐ If appropriate, carry out research to find partners (catering, equipment, technology etc.) that are needed and available.

- ☐ Send a detailed briefing to the possible partners to inquire about the event elements you've developed, so that you can receive customized responses and offers.

- ☐ Check the offers that are sent in and compare them.

- ☐ Create a draft concept (e.g. a PowerPoint presentation) that brings together the elements in question that match the event's structure, date and budget as well as the other framework requirements you have worked out.

- ☐ Prepare a cost calculation/a budget based on the offers you have received (see next step)

Please note: In your cost calculation, take into account the elements that are absolutely essential for staging the meeting. The detailed costs of other elements can be added later on the basis of your experience or a budget. They don't have to be included in your plan just yet.

Elements that should be included in your cost calculation:

- ☐ Hotel and/or location costs, including all the related additional costs
- ☐ Arrival
- ☐ Catering and conference packages
- ☐ Communication (graphics, invitations, all print materials, presentations, website, app, possibly media costs)
- ☐ Documentation: Video production & photographer
- ☐ Technology (stage, lighting, sound system, projection)
- ☐ Speakers, programme, presenter
- ☐ Branding and route information
- ☐ Decorations
- ☐ Human resources (hostesses, services, security, construction and dismantling, paramedics, fire brigade, cloakroom, restrooms)

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- ☐ Furnishings, equipment, amenities
- ☐ Transfers
- ☐ Miscellaneous: GEMA (German Authors' Rights Society), artists' social insurance, transportation and travel costs
- ☐ Meeting materials
- ☐ Participant management
- ☐ Definitely factor in a financial buffer to cover any unexpected costs!

Please note: Be sure to include a buffer for any extra costs!

- ☐ What direct and indirect income do I have from the event?
- ☐ Permanet budget control

4. Event organization

- ☐ Coordinate the content and cost of the concept with your client/team. Do the concept and the elements you have researched match your framework of preconditions?

- ☐ Make a date for an on-site inspection of the possible event venue so that all the details can be thoroughly checked and confirmed.

- ☐ The most important partners must participate in the inspection of the venue.

- ☐ Date for the inspection/location check:

  - o Parking opportunities
  - o Special bus drop-off points
  - o Facilities
  - o Are there possible problems that couldn't be seen before (pillars in the hall, layout, newness of the equipment, cleanliness etc.)?
  - o Safety (fire protection, escape routes etc.)
  - o Barrier-free locations
  - o What is available (equipment, technology, stage)? What must be rented in addition in order to meet the requirements?
  - o Where can the various services be positioned (registration, cloakroom, sessions & presentations, catering etc.)?
  - o Delivery area
  - o Smoking area
  - o Restrooms

- ☐ Discuss the details of the event with the location operator, technology companies, outfitters etc.

- ☐ Define program priorities

  - o Which topics are of interest to the target group?
  - o What is the best way to convey the content?
  - o In which rooms should the program take place?

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- ☐ Design, do layouting and send (or arrange the dispatch of) Save the Date messages and invitations

  - o What information must be included in the invitations?
  - o Analogue or digital?

- ☐ Organize participant management

  - o Organize the participant registration process
  - o If appropriate, set up a hotline for questions and changes

- ☐ Ask the people who will be on stage about their technical requirements, plan these and inform your technology partners

- ☐ Create set-up plans

  - o What ist he equipment and seating plan for each individual room?
  - o Technical facilities and lighting mood?

- ☐ Create flowcharts

  - o List all the individual program points in a timeline, complete with all the related information
  - o Event direction plan (program points, projections, microphones, background music, lighting effects)

- ☐ Make to-do lists for any elements missing from the flowchart. Flowcharts show where gaps still exist in the event planning.

- ☐ Plan the construction and dismantling periods (These plans must ensure smooth logistics for the specialized workers doing the construction and dismantling)
  - o Equipment: Which equipment will be provided by which companies?

- ☐ Make a "Branding, route information, signposting" list
  - o The list should include information about the locations, content, dimensions, materials, and producers of the materials
  - o Take the stage design into account
  - o Take the layout of the presentations into account
  - o Have the graphics and content produced according to the list

- ☐ Plan the catering

  - o How many people will be eating?
  - o When should coffee breaks and lunch breaks be planned in?
  - o Must special allergies/religious customs/food intolerances be taken into account?
  - o How should the catering be designed in order to match the meeting perfectly (brown bag sessions, small plates for food at the exhibition, finger food, buffet etc.)?
  - o Catering for the crew and the performers

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- ☐ Planning, creating and ordering conference materials
  - o Make a layout for the presentations
  - o Produce supportive content for the meeting (jingles, films, superimposed texts, PowerPoints)
  - o Printed materials (e.g. badges, a conference folder, feedback questionnaires)
  - o Carrier bags
  - o Biros
  - o Pencils
  - o Notepads

- ☐ Briefings for all the specialized workers, speakers and performers
  - o A general briefing about the event
  - o Information about arrival options and other framework conditions
  - o Precise areas of responsibility
  - o Times

- ☐ Human resources & team planning and briefings for the staff
  - o A general briefing about the event
  - o Information about arrival options and other framework conditions
  - o What is each person's area of responsibility and the place and time of his/her work assignment?
  - o Clothing
  - o Catering for the crew
  - o Cloakrooms
  - o Breaks

- ☐ Make phone lists that include the name, company, function and mobile phone number of each participant.

- ☐ Create an emergency plan

- ☐ Submit and receive registrations and authorizations
  - o Insurance policies
  - o GEMA (German Authors' Rights Society)
  - o Artists' social insurance
  - o If appropriate, contact the building authority for specialized uses

5. Event agendas & schedules

Please note: The following times are examples and must be adapted to the respective event.

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1–2 days before the event starts

- ☐ Delivery and set-up
    - o technology
    - o decoration
    - o seating
    - o **catering**
    - o preparing event rooms and checkrooms

- ☐ Furnish a back office (event bureau)

- ☐ Set up the cloakrooms for the performers/speakers

- ☐ Use of an intercom system for communication between the director, stage and technical team

On the day of the event, before the event starts

- ☐ Check all the constructions once again according to the lists and plans you have prepared (this "acceptance inspection" should be carried out at a realistic time so that all the specialized workers can do their work undisturbed)
    - o soundcheck
    - o technical check
    - o Run-through rehearsals oft he program items

- ☐ Personnel assignment — make sure all individuals are in their places and know their exact areas of responsibility
    - o Discuss emergency plan

- ☐ Hold a run-through meeting with all the specialized workers so that you can once again go through the event's flowchart point by point and check to make sure everything has been taken into account

- ☐ Registration of participants

Start of the event

- ☐ Stage and manage the event according to the flowchart, e.g.:
    - o Welcome speech
    - o Presentation of program
    - o Breaks
    - o Networking

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End of event

- ☐ Dismantling & cleaning

6. Follow-up

- ☐ Send thank-you notes to everyone involved (partners, supporters, speakers etc.)
    - o Providing event material (if necessary)
- ☐ Place photographs/videos on the (internal) website
- ☐ Media coverage (intranet, company news, trade press etc.)
- ☐ Kontrolle der eingehenden Rechnungen und deren Bezahlung
- ☐ Monitor the incoming invoices and the payment process
- ☐ Compile a final budget
- ☐ Send out and evaluate the feedback questionnaires.
- ☐ Evaluate the event so that you can perform even better in the future
    - o Which aspects were successful?
    - o What kind of feedback came from the guests?
    - o Reflect on the feedback and potential improvements.

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