

Corporate Event Checklist

By Campbell Rodriguez

☐ The Venue

- ☐ **Capacity** Make a shortlist of venues that suit the event theme and budget and have the capacity to comfortably hold all attendants.
- ☐ **Services** Ask each venue for a written proposal including all inclusions/exclusions and expenses. Check into parking, outerwear storage, security, seating, audiovisual capabilities, and any other requirements.
- ☐ **Walk-Through** Visit each site in person and imagine the event as it takes place.
- ☐ **Booking** In some cities, you may need to book up to 18 months in advance. Do not forget to pay the deposit to reserve the venue.
- ☐ **Insurance coverage** Make sure the venue has adequate liability insurance and consider buying extra coverage. Check state and local bylaws to ensure all insurance needs are covered, especially where alcohol is being served.
- ☐ **Timetable** Create a timeline of tasks and delegate to the planning team, with clear expectations and deliverables.
- ☐ **Accommodations** Book a block of hotel rooms to house guests for the duration of the event.

☐ Event Activities

- ☐ **Entertainment** Book any live entertainment at least six months prior to the event and confirm one month before.
- ☐ **Presentations or workshops** Identify seating and audiovisual requirements; ensure adequate equipment and supplies.
- ☐ **Sponsors** If the event is for a non-profit or a fundraiser, solicit donations and prizes from sponsors.
- ☐ **Speakers/Presenters** Book speakers and arrange their travel and accommodations; the time of booking may depend on how busy the speaker is. Confirm two weeks before the event.

☐ Meals & Refreshments

- ☐ **Caterers** Contact several caterers and ask for written quotes reflecting the number of attendees and the type of food required.
- ☐ **Inclusions** Make sure food and beverage service, table setting, dishes and glassware, etc., are included.
- ☐ **Refreshments** Provide adequate refreshments and snacks throughout the event, especially in secluded locations or where attendees are expected to stay on site.
- ☐ **Special diets** Ask guests to list any allergies, sensitivities, or dietary restrictions on their RSVP or sign-up form. Pass the information to caterers.

☐ Promoting the Event

- ☐ **Save the date** Send desired speakers and guests a request to save the date at least six months to one year in advance.

- ☐ **Appoint contacts** Designate planners as event representatives and distribute their contact information with all invitations and media releases.
- ☐ **Invitations** Send invitations with an agenda, hotel and flight information, and a request to RSVP at least ten weeks prior to the event.
- ☐ **Advertising** Prepare a media package and distribute to newspapers, television stations, radio stations, and industry bloggers.
- ☐ **Staffing the Event**
 - ☐ **Training session** Hold a training session or meeting for all attending staff and brief them on all activities and expectations the day of the event.
 - ☐ **Greeters** Appoint an adequate number of staff as greeters to welcome guests and orient them with the event activities and venue.
 - ☐ **Outside staff** Speak with management at the venue and the catering company to review expectations as far as services, staff dress code, rules, and contact persons.
- ☐ **Paperwork and Finances**
 - ☐ **Budget** Create a budget and have approved by executives before and throughout the planning process.
 - ☐ **Licenses** Ensure all laws and codes are met, with licenses or inspections completed for liquor service, fire code, special events, etc.
 - ☐ **Bookkeeping** Appoint one planner as treasurer to manage deposits, payments, receipts, and budget overages.
 - ☐ **Agenda** Create an agenda and distribute to all guests and executives well in advance of the event, after confirming the venue and speakers.