

# Corporate Event Planning Checklist

By Kimberly French

## 6 to 12 months before

- Goal** Determine the purpose of your event. The purpose is very important, as it determines the kind of activities you can organize for your event.
- Theme** If using a theme, make sure that it coincides with the values of your organization. Avoid cliches that will not attract guests or media coverage.
- Space** If you need to hold the event outside of your business space, start looking early. A strong purpose statement will help you determine the kind of space you will need.
- Management** Appoint an official general manager for the event. Whether it is yourself or someone else, a clear chain of command has to be set.
- Committees** After appointing the general manager, start building committees for the different aspects of the event. Breaking down the planning for big events is usually a good idea.
- Quotes** Get estimates from your usual or potential providers. The budget committee will need these to build their financial projections.
- Event Entertainment** If your event has an artistic component, request quotes from well-known artists or have auditions early in the planning.
- Sponsorships** If you will solicit sponsorships, work on the sponsorship resume right away. Potential sponsors will want to know the different sponsorship levels quite early, and it will also help with budgeting.
- Budget** While waiting for quotes and sponsors, build a preliminary budget. It can be modified throughout the planning stages.
- Permits and licenses** Check if you need any kind of permit or license around your event, especially if you plan on serving alcohol.
- Cover charge** If you will charge an admission price, determine the amount with the budget committee.
- Date** Finalize the date within the first three months of planning. This will help with coordinating artists, suppliers and other elements of your event without the risk of conflicts.
- Stationery** Meet with a graphic designer (in-house or consultant) and start drafting the different printed documents you will require for your event.
- Early printing** Hire a printer for invitations, reminders and sponsorship requests.
- Public relations** Meet with your relationist and build a preliminary timeline for publicity and media relations.
- Photography** If you need any pre-event and publicity photos taken, hire a photographer and take these as soon as you can.

## 3 to 6 months before

- Committees** Organize regular committee meetings and have them provide weekly reports to the general manager.
- Sponsorships** Start mailing sponsorship and donation request to potential sponsors and donors.

- Logos** Request company logos from confirmed sponsors to go on the next printed documents.
- Design** Have your graphic designer confirm the templates for all future printed documents.
- Printing** After finalizing the designs with your graphic designer, send your next printing orders to the printer.
- Ticketing** If your event will use tickets, have them printed at this time also, and make them available for distribution.
- Guest list** Build a final guest list, and mail invitations and other documentation to them.
- Entertainment** After confirming with your entertainers, sign a contract with them.
- Posters** Send out people throughout your city to look for potential locations for posters. Have them report on space availability.
- Media** Meet with your relationist and make appointments for interviews and other media coverage.
- Food** After choosing a caterer and signing a contract with them, choose the menu with them. Provide choices for different dietary requirements.
- Licenses** At this time, you should request the different permits and licenses you will need.
- Insurance** Do not forget to get liability insurance for your event; sometimes organization insurance does not cover these kinds of events.
- 1 month before**
  - Tickets** Check the ticket sales. Follow up with invited guests who have not yet responded.
  - Publicity** Reserve your publicity with radio and television stations as well as with printed media.
  - Staffing** If you require extra staff for the event, start advertising the positions now or go to an employment agency for help.
  - Space** Draw room diagrams and plan the seating, or whatever combination of space and tables you have.
  - Catering** By this time, you should have a good idea of how many guests will come; you should provide this number to your caterer so he can plan accordingly. Request a final quote from your caterer and sign a contract.
  - Timeline** If your event involves a sequence of presentations or entertainment, write down the timeline. Give the scripts to the participants, request comments and work through potential problems.
  - Security** Hire a security agency to estimate your security needs.
- 1 week before**
  - Committees** Meet with your committees one last time. Solve last-minute problems.
  - Guests** Confirm final guestlist and attendance numbers.
  - Staff** Organize preliminary staff meeting to explain tasks and confirm availability. Hire new staff right away if necessary.
  - Timeline** Send final timeline to the participants.

- Catering** Confirm your final order with your caterer.
- Publicity** Meet with journalists or media stations to finalize media coverage details.
- Rehearsal** Plan rehearsals as needed throughout the week.
- Payments** Have accounting write any cheques that need to be handed out on the day of the event.
- The day before**
  - Clothes** Choose your attire for the event, and have a change of clothes ready, just in case.
  - Providers** Confirm delivery times with all your providers, and verify any previously delivered items.
- The day of the event**
  - Arrival** Get to the event space early and supervise deliveries.
  - Inventory** Make an inventory of all supplies and make sure you have everything you need.
  - Staff** Put your staff in position and confirm their tasks.
  - Light and sound** Check with your technicians for any potential problems with the technical setup.
  - Rehearsal** Hold a final rehearsal a few hours before the event, and check the sound and lighting at the same time.
  - Enjoy the event and remember to relax** You've planned well and everything will work perfectly.
- Post-event**
  - Payments** Remember to pay any outstanding invoices.
  - Final reports** Request final reports from the committees, as well as a final budget.