Corporate Event Planning Checklist

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# Tasks:

☐ **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.*