



OUR DEFINITIVE CHECKLIST FOR PLANNING SUCCESSFUL MEETINGS & EVENTS

"FAIL TO PREPARE, PREPARE TO FAIL"

LONG TERM PLANNING

1 YEAR+ PRE-EVENT

Set Goals and Objectives – ask yourself these questions

- · Why is the event taking place?
- Who is the target audience?
- What does success look like Full house? Engaged audience? #Trending? Growth in membership? Key lessons learned? Event on brand and on budget? Smiling boss? Launch media coverage?
- How many people do you want/expect to attend?
- What venue or location might best support your event objectives?

Select a date

- Avoid red letter days of sports fixtures, matches, concerts, elections, holiday periods
- Choose a day and date that primarily suits your event attendees
- Talk to your preferred venue before you confirm your date as you may be able to get great venue discounts simply by being flexible with your dates.

Event Design

- Think about format and event design to select the most suitable venue
- What type of event is this? Motivational / Inspirational Instructional / Educational / Creative / Collaborative? Each type requires a different setting
- Do you need plenary space? Breakout space? How do you want the event to flow?

Event Marketing & Communications

 Create a Marketing and communications plan that considers your audience and the best channels to reach them - update regularly.

Budget & Costs

- Has the event taken place before? Or one like it? Can you base your numbers on it?
- What income will you have registration fees, sponsorships, exhibition fees?
- What expenses will you have marketing and communications, venue hire, graphic design and print, catering, AV and production, speakers, entertainment, furniture and equipment, exhibition stands, travel costs, car parking fees, agency fees, freelance staff, transportation and shipping, signage.

- What expenses will you have? (yes, ask that question all over again)
- Is this event a private company event (internal / B2B) or a public event (external / B2C). If it's an event open to the public then you'll need to consider attendee recruitment and costs associated with that.

Choose a location and venue

- Where will your attendees travel from if international, then locate close to airport; if local, consider car parking
- What event space or spaces do you need?
- How will you find the venue? Venue finding agency? Online search? Dedicated meeting booking site e.g. MeetingsBooker, Cvent, local convention bureau?
- · How many venues will you compare?
- Pay attention to the venue contract cancellation, attrition etc.

Plan your event content

- Develop the event content in the context of your original goals and objectives
- Try to craft a clever, catchy theme, title and tagline
- Think about topics and speakers
- · Attempt a rough programme outline.

Research speakers, presenters and entertainment

- Start with speakers who are experts on your preferred topics - LinkedIn is a great source of leads here
- Draw up your wish list of speakers
- Reach out directly or via a speaker bureau
- Be clear with speakers regarding fees, expenses, per diems etc particularly if they don't have a contract
- Think about re-cycling great speakers i.e. have them join on a panel discussion after their plenary address
- Contact an events agency like SEA
 entertainment to research recreative options –
 a cultural, musical or theatrical interlude
 can enhance even the most serious
 of meetings.



Sponsors

- Based on the space available at the venue, draw up a sponsorship prospectus - where and how can you provide visibility for sponsors without interfering with the core purpose / integrity of the meeting or event?
- Research sponsors who've partnered with similar events to yours
- Draw up your wish list of ideal sponsors
- Research what similar events are charging for sponsorship packages to determine the market rate.

Launch / Save the Date / and Registration

- Communicate date and headline data to all potential attendees as early as possible in the event planning process - for company events, this will involve internal comms; for public events it'll be an awareness building and recruitment campaign
- Pull all of the above information together and create a website and registration platform – there are many great ones available at no or low cost including Eventbrite and Cvent. These will also process on-line payments.

MID TERM PLANNING 12 WEEKS PRE-EVENT

Finalise content

- Confirm your event line-up and timings
- Finalise speaker or performer contracts and check any riders that may appear
- Get speaker or performer bio information and photos
- Arrange speaker or performer travel and accommodation
- · Finalise speaker gifts
- Provide all details to event app agency if using.

Promote, Promote

- If you're running a public event, research on-line for ideas around event promotion – you'll find rich picking on Julius Solaris' site EventMB, on the Cvent blog and on the Eventbrite blog.
- Have your speakers send you a 20 second video introducing themselves and their topic - put these out on social media
- Consider paid campaigns on Facebook and Linkedin
- Consider early bird, 3 for the price of 2 and other offers
- Drip feed information about the event over the duration of your promotional campaign, i.e, even if you know at the outset who all

- the speakers will be, release this information gradually the way they do for music festivals
- Leverage all vendor / supplier partners to help with the promotion
- Launch the event app.

Finalise venue details

- Think about catering conduct tasting, decide on final menus, be sustainable in your food provenance choices where possible
- Finalise production and AV share full event details with your AV team and get the benefit of their expertise and input
- Think about audience engagement can you do it on your event app? What about subscribing to Sli.do, one of the most user friendly audience engagement platforms
- Tweak your health and safety plan in the light of venue specifics
- Check your event insurance
- Check wayfinding walk the "attendee journey" and decide on signage, use digital screens if possible but do NOT scrimp on great signage
- Get to know your event manager and the wider team who will make everything happen on the day.

SHORT TERM PLANNING

30 DAYS PRE-EVENT

Attendee Recruitment

- Evaluate pace of ticket sales / registrations

 are you on track? Do you need more
 promotion? What promotions worked? Do you need to repeat?
- For in-company events, are registration in line with expectations?

Event Logistics and Details

- Check all details with speakers, sponsors and vendors
- Draw up minute by minute show flow document
- Finalise presentations with speakers.

 Check First Aid and Event Manager Box (full of wonderful bits and bobs like sticky tape, post-it notes, felt markers, electrical adapters, scissors, Bluetack, Gaffer tape, USB keys, adapters for MacBooks etc. etc. etc.).

Contingency plan

• Think about anything that could go wrong on the day and draw up a plan-B.

Print

• Sign off on any print pieces including signage, brochures, banners, buffet labels.

EVENT WEEK

Final details

- Email attendees with final information regarding the event - wayfinding, parking, name badge collection, catering options
- Confirm final attendee numbers to venue, caterer and any other number sensitive supplier
- Communicate attendee dietary requirements to venue / caterers
- Confirm all timings against show flow
- Make final contact with speakers and double check all requirements
- Share contact list with all supplier partners
- Consider setting up a WhatsApp group for key stakeholder comms

DAY BEFORE EVENT

Pre-con with venue / rehearsals

- Final walk through and briefing with venue and all key suppliers
- Monitor venue set up (if possible)
- · Hold rehearsals, if necessary

Prepare registration desk

- Print attendee list
- Print attendee badges

Note – you'll find a constellation of supports for #eventprofs on-line with some amazing free advice from the likes of EventMB, Eventbrite (who provided great suggestions for this check list), Cvent, Motivate and many others.

While sometimes #eventprofs work in isolation, there's an amazing community online so be sure to follow the hashtag #eventprofs to keep up to date with all that's current in the brave new world of event and meeting planning.