The Ultimate Event Planning Checklist

Planning an event is a lot of hard work, whether you're coordinating a small 50-person party or a massive 5,000 person gala. With so many moving parts, it's challenging to ensure that you remember everything.

That's where a checklist comes in.

Checklists help professionals in various industries follow through on complicated tasks without missing a beat. It's all too easy to forget minor (or sometimes significant) details, particularly when there are so many. Event planning must be like a well-oiled machine.

Fortunately, we've compiled the ultimate event planning checklist template for you to use. Best of all, this list includes steps for planning an event in a virtual or hybrid space. Let's begin.

Stage One:
Coming Up With Event Ideas

This stage could technically be called the "pre-planning" stage since you don't have to worry about logistics as much yet. The point of this stage is to determine the focus of your event. There are several aspects of this stage, including:

What Kind of Event Will It Be?

Are you selling tickets to this event, or is everything paid for by a company or sponsor? Are you trying to raise money for a charity? The type of event can affect everything else within your planning stages. For example, if you're planning a fundraiser, you'll want to set financial goals and figure out how you're going to collect donations (i.e., silent auction, 50/50 raffle, etc.).

- Fundraiser
- For-Profit Event
- Celebration (i.e., birthday, anniversary)
- Corporate Party
- Convention or Trade Show

What's the Purpose of the Event?

You can get pretty detailed about your event's purpose or objective. For example, perhaps your event will tie in with a product launch, or maybe you're coordinating the annual fundraiser for a nonprofit organization.

Knowing the event's goal will help determine other elements like your venue, promotional materials, and guest list. Also, in some cases, your objective might be quantifiable, such as getting 1,000 people to sign up for an email list or to sell X number of products.

Bonus: Ideation for Virtual and Hybrid Events

Even if you're hosting an event in a virtual or hybrid environment, the first two points on your checklist should be the same. However, since virtual events are generally less time-intensive than in-person ones, you have to plan accordingly. As a rule, it's hard to keep people engaged for more than two hours at a time, so if you're planning a multi-day event, you need to break up the festivities accordingly.

As a rule, it's hard to keep people engaged for more than two hours at a time.

The main point to consider when pre-planning for a virtual or hybrid event is whether you want everything to be live or have some pre-recorded or downloadable elements. The main advantage of a virtual event is that guests can log in from anywhere in the world. So, you can expand your guest list easily, but you also have to consider time zones to ensure that everyone can participate. In some cases, you might have a live session,

then show pre-recorded elements to the next session for those in a later time zone.

Stage Two: Initial Event Planning

Once you know the type of event you're planning and the various objectives, you can move into logistics. We'll break up the various pieces to consider at different points leading up to the event, such as a few months out, a week out, the day of, and more. During this stage, you're trying to figure out your event parameters, such as:

What's Your Budget?

This section will likely determine a lot of information as you move forward, including the type of venue you use, whether your event will have catering, what kind of entertainment you'll have, and so forth.

However, even if you have a limited budget, you might be able to secure some donations or borrow materials from various people, particularly if you're hosting a fundraiser.

When building an event budget, you need to start with your essential elements, including:

▸ Venue

▸ Guest List and Number

▸ Entertainment

▸ Security

▸ Food and Beverage

Starting with these pieces ensures that you can trim extras off your budget later on. Overall, you need a place to host your event, and you need something for people to do. Otherwise, what's the point of even having a party?

How Long Is Your Event?

Most events will run for a few hours, but sometimes, you may be coordinating a multi-day party or conference. The length of the event will affect your budget, so plan accordingly. Now is the time to develop a preliminary run of show based on some of your event ideas. This outline will likely change as you go, but having something written down will act as a foundation as you move forward.

6CONNEX

> One advantage of hosting a virtual event is that you don't need to secure a physical venue.

How Much Time Do You Have?

Ideally, you should have a few months to plan your event. However, last-minute parties and conferences can happen, so you need to be able to roll with the punches. Don't dawdle on various details even if you have an extended time frame. Typically, you need to secure your venue and dates first before planning anything else. For example, how can you know what kind of decor to use if you're unsure what kind of space you'll be in?

Bonus: Planning for Virtual and Hybrid Events

One advantage of hosting a virtual event is that you don't need to secure a physical venue. Instead, you have to find a suitable virtual event platform that will suit your needs.

If you're hosting a hybrid event, you need to consider elements like:

▸ **Live Streaming** - Will your physical venue be suitable for cameras or computer setups for those attending virtually? Will there be reliable wifi? For example, what if the event is outdoors or in a remote location?

▸ **Guest Estimates** - You'll need to know how many people plan to show up in person and how many will attend online. These numbers will influence your venue and the platform you're using. For example, something like Zoom works well for groups of up to 100 attendees. However, if your event will have a few hundred guests, you need something more robust (like 6Connex).

▸ **Interactivity** - Virtual attendees will be limited in what they can do from their computers. So, you have to consider the type of entertainment and how it will translate into both a physical and digital space. For example, if you're hosting a casino night, you can have some tables at your venue and some virtual tables for those logging in remotely.

Stage Three:
One Month (or More) Before the Event

Now we're getting into the nitty-gritty details of your event. By now, you should be able to lock down specific information, such as:

Venue Checklist

▸ Have you secured your venue yet? If not, now is the time to lock it down. If you're waiting for confirmation for a place, find a backup, just in case.

▸ Have you done a venue walkthrough yet? An on-site visit is necessary because it will help you visualize your various elements, such as catering, coat checks, entertainment (i.e., stage position, acoustics, etc.), and more.

▸ What will the parking situation be like? Will guests have to valet their cars, or is there sufficient parking nearby? Will you have to arrange shuttles to ferry attendees from a remote parking lot?

▸ Do you have a security team or system in place? How will you handle rowdy or drunk guests? How will you ensure that only ticketed or listed guests are in attendance?

▸ What kind of decor will you have? Are you providing decorations or hiring a company to do that for you? Or are you doing a mix of both?

Food and Beverage Checklist

▸ Are you hosting food and/or beverages during the event? If not, will guests be able to bring their own?

▸ Will the venue be providing any food or drinks? Are there restrictions on what you can serve? For example, what are the rules regarding alcohol?

▸ If you're serving food, are you providing it yourself or hiring a catering? Alternatively, you can hire a food truck or cart to serve guests.

▸ Have you sampled your food menu yet? Also, what about dietary restrictions like dairy-free, gluten-free, and vegetarian or vegan options?

▸ If you're serving alcohol, you need to follow local regulations and guidelines. For example, any bartender will likely need a liquor license, assuming that the venue allows a drink service. Will you be using your own bartenders or hiring a third-party company?

▸ Are you selling food or providing it for your guests? If you're selling, do you need to clear it with the venue? How will you handle cash and card transactions?

6CONNEX

Entertainment Checklist

▸ Have you secured entertainment for your event? Are you using one vendor to handle all of your entertainment or multiple? For example, you might hire a DJ, a photo booth, and a casino party company separately.

▸ For music, what kind of playlist do you want? Will the music change throughout the night? For example, light music during dinner, then dance music once the festivities start.

▸ If you're hosting live entertainment (i.e., a band, comedy act, or magician), ask them about rehearsals and set visits. Usually, these acts will need to do their own walkthroughs to check the acoustics and other variables.

▸ Will you be hosting multiple entertainment options simultaneously? For example, will a photo booth be running alongside casino tables? Or will everyone participate in the same activity at once?

▸ Will you be handing out prizes or hosting a raffle drawing? Will the raffle be separate from everything else or tied into the entertainment? For example, can guests win tickets or prizes on casino tables or get points for winning a game show?

▸ If you are providing prizes, will guests need to be present to win? If not, how will you know who to send the prize to afterward?

Event Itinerary

Once you're a month away from your event, you should have a pretty firm run of show for the night (or multiple nights). At this point, you may be waiting for confirmation of some elements (i.e., entertainers), but you should have your itinerary fleshed out.

▸ Will there be an opening ceremony or remarks? What about closing remarks?

▸ Will the event be broken into different stages? For example, opening with a cocktail hour, then dinner, announcements, then entertainment?

▸ Will guests be able to come and go as they please throughout the event? Or will some elements be mandatory (i.e., live auction or company announcements)?

▸ Will guests receive an event itinerary before the event? If not, how will you announce changes and updates during the event? Will announcements be necessary?

Bonus: Adapting Your Late-Stage Planning for Virtual and Hybrid Events

Here are some unique elements to consider when preparing a virtual or hybrid event:

Venue Checklist

▸ Have you secured a virtual event platform yet? Have you tested it to see how easy it is for guests to log in and interact with the program?

▸ Do you know how many guests can attend virtually? Some platforms may have a maximum number, such as 500 or 5,000.

▸ Will you have to worry about bandwidth issues or lag?

▸ Have you figured out how to live stream your hybrid event to virtual attendees? Will there be unique elements for both in-person and virtual guests?

Food and Beverage Checklist

▸ Will you incorporate any food or cocktails into your virtual event? For example, will attendees be encouraged to pour drinks during the party, or will you send out cocktail kits ahead of time?

Entertainment Checklist

▸ How will your entertainment integrate within the event software? Have you tested the program to ensure that it will work?

▸ Will guests be able to go to different virtual rooms during the event? Or will everything be scheduled and take place in the same room?

▸ What are the audio and visual limitations of your virtual event software? What happens if there's a glitch during the event? Are you giving prizes for your event? If so, how will you send the items to the winners?

Event Itinerary

▸ If you're going to host an event that's longer than two hours, be sure to include breaks between. For example, perhaps guests will attend a seminar during the day and a virtual cocktail hour/ trivia night in the evening.

▸ You will also need to provide time for troubleshooting and opening remarks. Typically, a representative from the event platform will have to go over the tools guests will use to interact with the software. Similarly, whoever is hosting the entertainment will have to explain how it works, especially if the entertainment is interactive (i.e., a trivia program).

6CONNEX

As you get closer to the event date, it's much harder to adjust anything beyond superficial elements.

Stage Four:
Two Weeks Before the Event

Now is the time to finalize any detail that may still be up in the air. With two weeks to go, you can still make significant changes, such as if a performer backs out or the venue has an unexpected problem. As you get closer to the event date, it's much harder to adjust anything beyond superficial elements.

By now, you should have the following elements locked in:

▸ **Venue Space and Duration** - For example, if your event runs for three hours, when can you access the venue, and how late can you stay afterward? Is there a charge for early setup or late teardown? If you're hosting a virtual or hybrid event, ensure that you've run through the software and done a full dress rehearsal with everyone involved. Doing this ensures that there are fewer technical issues on the event day.

▸ **Run of Show** - You might not have all the details finalized yet, but you should have a solid idea of what the night will look like. Be sure to budget for delays, especially for larger events. Trying to herd massive numbers of people can be challenging, even under the best conditions.

▸ **Entertainment** - By now, you should have any talent or entertainment vendors locked in. If you're borrowing any games or activities, make sure they're still available. Now is also the time to pay any outstanding deposits so that your entertainers are less likely to cancel.

▸ **Food and Beverage** - You should know what you're serving and from where the food will be coming. If you have a caterer, now is the time to finalize any menu adjustments. If you're providing food yourself, make sure to source it and find backup options, just in case. For example, if you're planning on buying water in bulk, what happens if the store is sold out? Now may be a great time to buy any shelf-stable dishes.

▸ **Event Content** - Examples of content can include posters, welcome videos, pamphlets, flyers, and swag bags. If you're getting anything printed, check the proofs now so that you have time to make any corrections if necessary. If you're doing live presentations or welcome messages, now is the time to finalize your scripts and start rehearsals.

6CONNEX

Stage Five:
The Week Before the Event

As the saying goes, the best-laid plans often go awry. It's at this point that you'll likely start experiencing issues, such as accessibility problems with the venue, last-minute cancellations, and more.

A big part of event planning is the ability to roll with the punches, so now is the time to start coming up with backup solutions. Here are some potential disasters that you can avoid by planning now:

▸ **Venue Issues** - Usually, problems occur if a venue hosts an event before yours in the same room. This issue often happens during a busy season when venue spaces are in high demand. You may also discover that loading equipment and materials into the venue is not as feasible as you thought. Talk to your venue coordinator about any last-minute concerns. Also, by now, you should have all your decorations and interior design elements in stock and on hand. Don't make any trips to the party supply store the day of the event.

▸ **Cancellations** - If a performer or entertainment vendor cancels, you should have one or two backup options ready to go. Typically, the only time a cancellation is a huge problem is if they're the main reason for guests coming to the event. Otherwise, it's relatively easy to find a similar entertainment option a week out.

▸ **Food Shortages or Supply Issues** - A menu is a pretty easy fix when you have a week to adjust it. Even if you've sent out the menu to guests ahead of time, you can update the information as necessary. As long as you provide dietary options, food problems shouldn't be a massive headache.

▸ **Event Content** - Here is where you're likely to run into the most problems. Videos may still be getting edited, and posters may still be getting finalized. As a rule, set the deadline a couple of days before the event so that you can have final copies before event day and won't be scrambling. If you're sending packets to guests for a virtual event, you want to mail them at least a week before to account for mail delivery issues.

6CONNEX

Stage Six:
The Week of the Event

Hopefully, your planning in the first five stages means that you can take it easy this week. As long as you've prepared for potential disasters, you can simply activate your Plan B and adapt accordingly.

During the week of the event, you should be handling elements like:

▶ **Creating Swag Bags or Welcome Packets** - It will take hours to build these, even if you have multiple people working on them. If possible, have these packets pre-made so that you're not doing everything on-site on the event day.

▶ **Rehearsals** - If you have a tight run of show, now is the time to rehearse any statements or presentations. Try to do a final dress rehearsal two days before the event so that you can work out any remaining kinks before you go live.

▶ **Arrival and Departure Times** - Double-check with your vendors and setup crew to determine when everyone will arrive at the venue. You should also finalize departure times, particularly if the venue has a small or limited loading dock.

▶ **Event Duties** - Everyone on your team should have a list of duties on the event day. Now is the time to run through those duties and what to do if someone can't make it for whatever reason (i.e., a stomach bug).

Bonus: Last-Minute Event Planning for Virtual and Hybrid Events

If you're working with multiple vendors and presenters, you should have a full dress rehearsal with everyone at least two days before the event. If someone can't make it, share any details from your rehearsal, particularly if you make any last-minute changes. All event content should be done by now, so presenters can practice screen sharing for videos, virtual posters, and more.

If you're working with multiple vendors and presenters, you should have a full dress rehearsal.

6CONNEX

Stage Seven:
Event Day

Even if your event is in the evening, your day will be jam-packed with activity. The best way to ensure a smooth event is to add a one-hour buffer to your preparation timeline. Doing this can alleviate most time constraints or delays that happen, such as:

- **Traffic** - It's impossible to know exactly what traffic will be like for vendors and your team.

- **Loading Issues** - Most venues have a single loading dock, which can get backed up with deliveries and other events happening in the building.

- **Last-Minute Call-Outs** - If someone can't make it for whatever reason, everyone else has to pick up the slack, which can slow everything else down.

- **The best way to plan your event day is to work backward from your start time.** This strategy will give you a much more accurate timeline. Then, just add another hour in the beginning.

Bonus: Virtual and Hybrid Event Day

Have everyone working the event log in at least an hour early to run through any last-minute rehearsals or troubleshoot any technical issues. You can also have clients log in early to discuss any details or ask any questions.

The best way to ensure a smooth event is to add a one-hour buffer to your preparation timeline.

6CONNEX

Stage Eight:
Post Event

Whether your event goes off without a hitch or you have some significant issues, your job isn't finished once the guests go home. Some post-event items to take care of can include:

- **Guest Follow-Up** - You don't need to ask every attendee what they thought of the event, but talk with some of the high-profile guests to figure out what they liked (and disliked) the most. Knowing these details can help you plan better for future events.

- **Inventory** - If you supplied any materials for the event, you want to conduct a complete inventory a day or two afterward. Doing this allows you to discover any damaged or missing components. For example, perhaps something got left behind at the venue.

- **Team Debrief** - Talk with everyone on your team about what went right and what could have been better. This kind of post-event session helps bring the team together and ensures that you can be more prepared next time.

- **Prizes** - If you need to send prizes to winners, be sure to do so within three days of the event day. Also, it's good form to verify where the prize is going and notify the winner that it's on the way. Prizes can also be an excellent way to promote your business through social media, with winners showing off their winnings online.

- **Final Payments** - Don't forget to pay any vendors or entertainers after the event. Ideally, you can handle these payments within a week or two, depending on the situation. You should also be able to determine your profit margin and figure out where you can make adjustments for next time.

Keep track of your event process with our interactive checklist on the next page. **6Connex is here to make sure all your t's are crossed and your i's are dotted!**

6CONNEX

About 6Connex Virtual Event Solutions & Event Tech

6Connex is the leading provider of in-person, hybrid, and virtual event technology for enterprises worldwide. Our cloud-based product portfolio includes in-person event apps, virtual venues, webinars, learning management, and more. Designed for corporations in need of engaging with communities in-person, virtually, or in a hybrid fashion.

From marketing, sales, recruitment, training, and HR communications, to event planning, non-profits, remote offices, and more, we allow you to engage and transform big ideas into real-world results.

Have Questions? Please call 1.800.395.4702 or email us at <u>sales@6connex.com.</u>

Set Your Goals

○ **Create your event theme or idea**

○ **Determine what kind of event will it be**

    ○ **Fundraiser**

    ○ **For-Profit Event**

    ○ **Celebration (i.e., birthday, anniversary)**

    ○ **Corporate Party**

    ○ **Convention or Trade Show**

○ **Set event goals and purpose**

○ **Determine your event time: in-person, hybrid or virtual**

Start Planning

○ **Start your Initial Event Planning**

○ **Set Your event budget**

○ **Find a date and time**

○ **Start the event timeline and agenda**

○ **Start researching live streaming options**

○ **Guest estimates - How many in-person and/or virtual guests are you planning**

○ **Start researching entertainment for both your physical and digital space**

One Month (or More) Before the Event

Venue Checklist

- Secured your venue
- Do a venue walkthrough
- Determine the parking situation
- Determine event security and/or system
- Start planning decor
- Secure a virtual event platform (we could help with that)
- Determine how many guests be hosted virtually
- Find a live stream vendor (we have some ideas)
- Design your virtual venue (example: you can replicate the physical venue to help guests feel more connected)

Food & Beverage Checklist

- Consult with venue for vendors and serving rules
- Plan food and drink menu
- Hire a vendor and/or caterer
- Sample food menu
- Reach out to guests for any dietary restrictions
- Hire a bartender
- Get liquor license (if not already provided by bartender)
- If food is being sold, determine pricing
- Find a way to engage your virtual audience (example: supply virtual attendees with cocktail kits)

6CONNEX

Entertainment Checklist

○ **Secure entertainment (examples: DJ, a photo booth, or a casino party)**

○ **Plan music for the event (example: different playlists for different moments during the event)**

○ **If you're hosting live entertainment (i.e., a band, comedy act, or magician), schedule rehearsals and set visits**

○ **Determine how your entertainment will integrate within the event software (example: a photobooth that offers both physical and virtual options)**

○ **Purchase supplies and prizes for any games or raffles**

○ **Determine rules for claiming prizes (example guests must to be present to win or winner will be notified by email)**

○ **Plan how any prizes will be distributed to virtual attendees**

Event Itinerary

○ **Finalize any MCs, Keynotes, or other speakers**

○ **Start scripting opening and closing remarks**

○ **Set event schedule (example: open with a cocktail hour, then dinner, announcements, then entertainment)**

○ **Finalize agenda to share with guests and speakers**

○ **Schedule a tech training for your event planners, speakers and entertainers**

○ **Schedule a test run for your speakers and entertainers**

○ **Invite your guests!**

6CONNEX

Two Weeks Before the Event

- Have a plan for set-up and teardown - How early/late can you be there?Is there a charge for early setup or late teardown?

- Don't forget that test run for your virtual component!

- Run of Show - You might not have all the details finalized yet, but you should have a solid idea of what the night will look like

- Pay any outstanding deposits so that your entertainers are less likely to cancel

- Finalize any menu adjustments. If you're providing food yourself, make sure to source it and find backup options, just in case.

- Finalize Event Content - (Examples: posters, welcome videos, pamphlets, flyers, and swag bags)

The Week Before the Event

- Talk to your venue coordinator about any last-minute concerns

- Have all your decorations and interior design elements in stock and on hand. Don't make any trips to the party supply store the day of the event.

- If a performer or entertainment vendor cancels, you should have one or two backup options ready to go

- Triple check your food menu and adjust for any food Shortages or supply Issues

- Mail out any packets/goodie bags to your virtual audience

- Approve those proofs! You should have started getting back drafts for any content. Review, and get any changes back for ample print/production time.

The Week of the Event

- Create your Swag Bags or Welcome Packets - Grab your event team and start a swag bag assembly line

- Hold your rehearsals and tech run throughs

- Double-check with your vendors and setup crew to determine when everyone will arrive at the venue.

- Review Event Duties - Run through the event with your team and make sure everything is covered, and everyone knows their tasks

6CONNEX

Event Day

- Have a team member on-site ready to assist guest's questions

- Have your back-ups ready for last-minute cancelations

- Have a team member online for any tech issues or questions for your virtual venue

- Have your speakers and entertainers login at least an 30 minutes before their scheduled time

Post Event

- Send a summary and thank you to your guests as a follow-up

- Take inventory of what you have left after the event concludes

- Meet with your team for an event debrief

- Send any prizes no later than three days after the event concludes

- Make any final payments to your vendors

6CONNEX