

The Ultimate Checklist for **EVENT PLANNERS**



CONTENTS

PLANNING	01	
EXECUTION TEAM	02	
FINANCES	03	
SPEAKERS	04	
PROGRAM SCHEDULE	05	
VENUE AND LOGISTICS	06	
	07	SECURITY CONCERNS
	08	EVENT MARKETING
	09	INTERNET UBIQUITY
	10	THE BIG DAY
	11	POST EVENT

FROM PLANNING THE EVENT TO POST EVENT FOLLOW UP, AN EVENT ORGANIZER NEEDS TO TAKE CARE OF THINGS. THE CHECK-LIST THAT FOLLOWS, CAREFULLY ENCOMPASSES ALL THESE SUBJECTS SO THAT NO EVENT PLANNER MISSES A THING . FIND THE SUBTOPICS COVERED IN THE TABLE OF CONTENTS THAT PRECEDES.



01 PLANNING

THE FIRST BIG STEP

Coherent Planning gives the essential kick-start for organising an event. It also ensures efficient execution till the end. That is why; defining your event outline invariably becomes the first step of hosting an event. Here is a check-list which will help you get successfully done with this first big step.

- ☐ **Define the Event Objective (WHAT and WHY)**
 - ☐ Define the main purpose of the event
 - ☐ Define the type of the event (For e.g. - Charity, Promotional, etc.)
 - ☐ Define the theme of the event
- ☐ **Define the Target Audience (WHO)**
- ☐ **Define the Date and Time (WHEN)**
 - ☐ **Choose a tentative date**
 - ☐ Check if the weather and the season would interfere with your event
 - ☐ Check if the date clashes with other major event
 - ☐ Check the availability of venue, speakers, etc. on the given date
 - ☐ Finalise the date
 - ☐ **Choose tentative timings**
 - ☐ Check the availability of venue
 - ☐ Check the availability of permissions if it is a late night timing
 - ☐ Finalise the timings
- ☐ **Define the Exhibitors**
 - ☐ Choose the type of exhibits
 - ☐ Define what you need to exhibit
 - ☐ The exhibits are in sync with the venue theme
 - ☐ Define the demographics of the exhibitors who might be interested
- ☐ **Get an estimate of the number of attendees**
 - ☐ **Define your audience**
 - ☐ Define the demographics of the desired attendees
 - ☐ Define the connecting characteristics of the attendees (For e.g. – alumni of the same school)
 - ☐ **Number of attendees**
 - ☐ Number of attendees who have attended previous similar events
 - ☐ The number of attendees you are planning to invite
 - ☐ The number of VIPs and Guests to be invited for the event
 - ☐ The number of exhibitors you plan to permit

☐ **Pick up a Venue (WHERE)**

(Check out the best venues for business conferences in India [here](#))

- ☐ The Venue size is enough for the approximated number of attendees
- ☐ The Venue theme is in sync with the theme or objective of the event
- ☐ The Venue provides ample amenities required for the proposed event
- ☐ The Venue has proper amenities for the proposed exhibitors

☐ **Create a Basic Action Plan for the event (HOW)**

- ☐ The primary objective of the event is decided
- ☐ The sub parts of the event are decided
- ☐ Define timings for each event part



02 EXECUTION TEAM

TEAM WORK, BEST WORK

Putting up an event is a big thing. It is surely no 'one person' task. So now that we are done with the planning, let us look at the execution team that we will need. Next up is a check-list where you can find all the staffing requirements for the successful execution of any event.

- ☐ **Event Manager**
- ☐ **Deputy Event Manager (if required)**
- ☐ **Local Authority Official**
- ☐ **Emergency Services Official**
- ☐ **Schedule Planner(s)**
- ☐ **Anchor(s)**
- ☐ **Exhibition Team**
 - ☐ Exhibitors' Manager
 - ☐ Exhibition Design Team
 - ☐ Coordinators and assistants for exhibitors

- ☐ **Venue Planner**
 - ☐ Site Inspector
 - ☐ Venue Designer(s)
 - ☐ Logistics Team

- ☐ **Security**
 - ☐ Security Head
 - ☐ Gate Security Team
 - ☐ Venue Security Team
 - ☐ Parking Security Team

- ☐ **Infrastructure and Utilities Official (Electricity, Water, Toiletries, etc.)**
- ☐ **Documentation Team**
 - ☐ Photographer(s)
 - ☐ Videographer(s)
 - ☐ Written Documentation Specialist

- ☐ **Catering Team**
- ☐ **Supplies Officer**
- ☐ **Transport and Accommodation Team**
- ☐ **Marketing Team**
- ☐ **Accounts Team**
- ☐ **Sanitation and Cleanliness Team**
- ☐ **First Aid/ Medical Services**
- ☐ **Volunteers for the Event Day** (Available to guide the attendees throughout)



03 FINANCES

FIX THE MONEY TROUBLE

For organizing any event, big or small, you don't just need finances but you also need some careful financial management. From budget to sponsorships to the ticketing charges, there is a lot which needs your acute attention. Find a check-list next which won't let you miss a crucial thing for your finances.

- ☐ **Lay out an estimate of the Budget Required**
 - ☐ **Staff**
 - ☐ Primary payments for the staff
 - ☐ Added incentives
 - ☐ Cost of travel, food and accommodation for the staff members
 - ☐ **Venue and Logistics**
 - ☐ Venue Rent
 - ☐ Cost of Furniture, Décor, etc.
 - ☐ Cost of Technical Requirements (Projectors, microphones, etc.)
 - ☐ Cost of Data connection
 - ☐ Cost of licensing, contracts, permits, etc.
 - ☐ Cost of printing badges/IDs, etc.
 - ☐ **Budget for Catering**
 - ☐ **Budget for Guest Accommodation**
 - ☐ **Budget for Travel and transportation of the guests**
 - ☐ **Internet Ubiquity Requirements**
 - ☐ Cost of creating an Event Website
 - ☐ Cost of creating an Event Application
 - ☐ **Marketing expenses**
 - ☐ Cost of flyers and posters
 - ☐ Cost of paid social media advertisements
 - ☐ Content Writing for various advertisements
 - ☐ Web Development
- ☐ **Sponsorship (Find some tricks for getting an event sponsorship [here](#))**
 - ☐ List out your sponsorship requirements
 - ☐ Market Research for finding the potential sponsors
 - ☐ Plan the number of sponsors needed
 - ☐ Plan the specific perks for the sponsors
 - ☐ Finalise the Event Sponsors

☐ **Plan the Ticket Charges**

- ☐ Various Ticketing Plans (e.g. – VIP, Premium, etc.)
- ☐ Discounts on Tickets
- ☐ Online Ticketing Platform
- ☐ Offline Ticketing Platform
- ☐ On Venue Ticketing Platform
- ☐ Payment options for the tickets (Card payments, net banking, etc.)

☐ **Plan the Exhibitors' Charges**

- ☐ Registration Charges
- ☐ Basic Registration fess
- ☐ Advertising Costs Staff Costs
- ☐ Logistics and amenities Costs
- ☐ Follow-up advertising (if applicable)

☐ **Plan the parking Fees (if needed)**

- ☐ Parking charges
- ☐ Payment options for the parking charges



04 SPEAKERS

THE START OF THE SHOW

Speakers, Performers and Exhibitors are the people who in actual sense put up the show on the front end. That is why it is very necessary that their work is very carefully monitored. Now you will find a check-list which will help you ensure that you have all their work sorted.

☐ **Speakers**

☐ **Speakers' List**

- ☐ Market Research for finding potential guest speakers related to the event
- ☐ Narrow down and prioritise the list of the speakers
- ☐ Contact the speakers to ensure their availability
- ☐ Finalise the Speakers' List

☐ **Agendas of the Speakers**

- ☐ List down the specialties of the finalised speakers
- ☐ List down the required/preferred agendas for the event
- ☐ Confirm the agendas with the speakers

☐ **Fulfil the special needs of the speakers (if any)**

☐ **Performers**

- ☐ Decide the type of entertainers you wish to invite (Comedians, Dancers, Musicians, etc.)
- ☐ Market research the best performers available in the category chosen by you
- ☐ Filter them based on your budget
- ☐ Confirm their availability on your required dates
- ☐ Finalise their performances
- ☐ Fulfil their equipment and technical requirements
- ☐ Ensure if they have any special needs

☐ **Exhibitors**

☐ **Type of exhibitors required**

- ☐ Type of exhibits
- ☐ Demographics of the exhibits

☐ **Inviting the exhibitors**

- ☐ Send out e-mail invitations to relevant organisations
- ☐ Post invitations on Social Media Platforms
- ☐ Publish invitations in Media channels
- ☐ Advertise locally

☐ **Registrations**

- ☐ Create online and offline registration portals
- ☐ Ask for relevant exhibit details
- ☐ Create Online and Offline Registration Portals
- ☐ Filter out the exhibitors based on your requirements and preferences
- ☐ Finalise the exhibitors

☐ **Exhibitors' requirements**

- ☐ Send out requisition forms to exhibitors
- ☐ Create quantitative list of the requirements from the responses received
- ☐ Ensure the availability of them

A close-up photograph of a person's hand holding a pen and writing on a white notepad. The notepad is placed on a metallic surface. The word 'Meeting' is written in a large, cursive script, and '14:30' is written below it in a similar style. A blue diagonal graphic element is on the left side of the image.

Meeting
14:30

05 PROGRAM SCHEDULE

TO BE ON TIME, BE IN TIME

The discerning factor of a successful event is that everything runs right on time. The scope of delays is nil or absolutely minimal. But for this to actually happen, you need to be ready before-hand with a clear-cut program schedule. Find a check-list next which will tell you what all things need to be taken care of.

☐ **List down the various tasks to be done in the event**

- ☐ Speakers
- ☐ Activities
- ☐ Exhibitions
- ☐ Leisure
- ☐ Breaks
- ☐ Food
- ☐ Breaks

☐ **Plan out the various event sessions**

☐ **Keynote Speech**

- ☐ Who will be giving the keynote speech?
- ☐ What is the theme to be set-up with the speech?
- ☐ Timings and Duration of the speech

☐ **Parallel Sessions**

- ☐ Number of parallel sessions to run
- ☐ Panellists/Moderators/Chairs/Speakers of the individual sessions
- ☐ Timings and Duration for individual sessions

☐ **Panel Discussions**

- ☐ Number of panellists to be included
- ☐ Topics of the panel discussion
- ☐ Duration and timings of the discussion
- ☐ Moderator for the discussion
- ☐ Number of audience members permitted

☐ **Round Table Conferences**

☐ **Timings**

- ☐ Finalise the exact event timings
- ☐ Distribute them properly amidst the tasks to be done
- ☐ **Define Move-in and Move-out time for exhibitors**
 - ☐ The timings give proper time slot to exhibitors to set-up and wrap
 - ☐ The exhibition timings are enough according the theme
- ☐ Ensure the availability of the timings with the venue
- ☐ Ensure the availability of the timing with the VIPs and Guests

A photograph of a modern conference room. The room features rows of orange chairs facing a stage area. On the stage, there is a large white projection screen, a podium, and a table with water bottles. The ceiling is a grid of recessed lights, and large windows are visible on the left side. A blue diagonal graphic element is on the left side of the image.

06 VENUE AND LOGISTICS

THE BIG LIST OF STUFF

A successful event is not just about a good show. It is also about taking care of all the requirements and comforts of your attendees. You need to sort venue, logistics, transportation, accommodation, catering and a lot more to have the perfect event flow. The check-list next will help you make the right decision and sort these requirements of your event.

☐ **Venue Booking**

☐ **Survey the various venue options available**

☐ **Compare the event size and theme with the options**

- ☐ Check the on-site staff available
- ☐ Check what kind of events have been held previously in the venue (Ask for references as well if required)
- ☐ What are the IT capabilities, Network Facilities, Technical Staff availabilities, etc. in the venue?
- ☐ Does the venue have ample space to host the exhibition?
- ☐ How many exhibit stands can be put up?
- ☐ What type of stands can be put up? (Modular or Custom)

☐ **Finalise a venue located in a targeted area**

☐ **Ensure the availability of the Venue**

☐ **Ensure the permissions and licensing for the event**

☐ **Book the Venue**

☐ **Logistics**

☐ **Venue set-up and design**

- ☐ Venue set-up for the exhibition (stand designs, stand area, etc.)
- ☐ Venue set-up for Panel Discussion (Panel set-up on the stage, seat for moderator on the stage, audience seating)
- ☐ Venue set-up for Round Table conference (Participants' set up, audience set up)
- ☐ Venue set-up for Parallel Conferences (Separate rooms, audience seating set-up in all the rooms, speaker/presenter seating)

☐ **Leverage the registration analytics to plan out the halls for different sessions**

☐ **Decorations and Aesthetics**

- ☐ Decoration plan for the venue
- ☐ Items required for the decorations (with their quantities)

☐ **Seating**

- ☐ Number of people to be seated on the Stage
- ☐ Stage seating plan
- ☐ Number of people to be seated in the audience area
- ☐ Seating Plan of the audience are according to prioritisation of the attendees

☐ **Staging**

- ☐ **Exhibition Stands**
 - ☐ IT Requirements
 - ☐ Furniture
 - ☐ Stationary
 - ☐ AV Requirements
 - ☐ Other Special Requirements
- ☐ **Technical Requirements (Computers, Cameras, etc.)**
- ☐ **Audio-Visual Requirements (Projectors, microphones, etc.)**
- ☐ **Lighting and sound**
- ☐ **Signs and Hoardings**
 - ☐ Signs and Hoarding for the event publicity
 - ☐ Signs and Hoardings for the event venue
 - ☐ Hoardings of the sponsors for the event venue
- ☐ **Dust bins**
- ☐ **Name tags/ Badges/ IDs for the attendees and the organisers**
- ☐ **Arrangements for people with physical disabilities**
 - ☐ Proper measures for their entrance
 - ☐ Proper facilities for their seating
- ☐ **Transportation Facilities**
 - ☐ **Transportation Routes**
 - ☐ Routes convenient for a majority of the attendees
 - ☐ Routes connecting major parts of the city to the venue
 - ☐ **Number of people requiring transportation**
 - ☐ **Transportation Vehicles**
 - ☐ **Accommodation facilities**
 - ☐ **People to be accommodated**
 - ☐ The number of attendees/exhibitors to be accommodated on paid basis
 - ☐ Number of guests to be accommodated
 - ☐ **Accommodation Venue**
 - ☐ Accommodation venue is close to the event venue
 - ☐ Accommodation venue has different suite options for the guests
 - ☐ **Accommodation Charges**
 - ☐ Charges of the different suite types available
 - ☐ Multiple payment options for the accommodation charges

☐ **Catering Requirements**

- ☐ Number of meals to be served
- ☐ Number of attendees/ guests/exhibitors to be fed
- ☐ Types of meals required (Breakfast, Lunch, High Tea, Dinner)
Menu for all the meals

☐ **Create a Parking Plan**

- ☐ Define the approximate number of vehicles
- ☐ Define the available parking space
- ☐ Distribute the parking space in a priority order (Nearest for the VIPs, etc.)



07 SECURITY CONCERN

BETTER SAFE THAN SORRY

A wise event organiser is one who is ready for all types of security concerns which might take place before, during or after the event. This not only includes an ensemble security team, but also being ready for all other hazards that can take place. Find a check-list next which will help you stay prepared against all these possible risks and issues.

☐ **Health care and First-Aid**

- ☐ An on-site health care and first-aid system
- ☐ Health-care and first-aid material requirements
- ☐ On call ambulance ready in case of emergencies

☐ **Venue Security**

- ☐ Security Team
- ☐ Arms and Weapons for the Security Team
- ☐ Other Security Tools (For e.g. – CCTV Cameras, monitors, etc.)

☐ **Event Insurances** (To protect your organisation from any lawsuits in case of injury, death, property damage, etc.)

(Know more about the safety measures to be taken at events [here](#))



08 EVENT MARKETING

SPREAD THE WORD BETTER

In the 21st century, 'spreading the word' is definitely not enough for marketing your event. To ensure quantitatively and qualitatively better crowd at your event, you need to be very specific and structural with your event marketing. Take a look at the checklist next. It will surely guide you through this web.

- ☐ **Put up Event Hoardings and posters Locally**
- ☐ **Publish paid promotions in media (Newspapers, Magazines, etc.)**
- ☐ **Getting articles published in media (For e.g. – A small pre-event talk published in a local newspaper)**
- ☐ **Marketing with your personal community (For e.g. – You social circles, professional circles, etc.)**
- ☐ **Cross marketing with exhibitors**
- ☐ **Get your speakers to give a shout out on social media**
- ☐ **Run contests, create polls, discussion forums to engage your attendees**
- ☐ **Announce a 'design the logo' contest and get people to vote for it**
(Read how to create the perfect event logo [here](#))
- ☐ **Send online and offline invitations to related organisations**
 - ☐ Create the event invitations in sync with the event's theme
 - ☐ Create a list of the organisations to be invited Categorise the invitees for sending the online/offline invitations Send out the invites
- ☐ **Get into e-mail marketing**
 - ☐ Create a database from your and sponsors' clientele
 - ☐ Generate e-mail leads
 - ☐ Send out e-mails to potential attendees
 - ☐ Event announcement e-mail
- ☐ **'Registrations open' e-mail**
- ☐ **E-mails with information regarding discounts**
- ☐ **Final Reminders** (When the event is approaching)
- ☐ **Audience Engagement Tools**
(Find the top 10 engagement tools of 2017 [here](#))
 - ☐ Audience Responses Technology (For collecting real time responses and feedback from the attendees)
 - ☐ Attendees' Networking Platform (To let them interact with each other)
- ☐ **Get Promotional Items to be distributed on the event day** (For e.g. – Customised mugs, etc.)
- ☐ **Set-up referral rewards**

(Read about some great event marketing tactics [here](#))



09 INTERNET UBIQUITY

THE WEB TRICK FOR EXTRA EFFICIENCY

Today, internet has become this whole different spectrum where your event needs to find its place. By marking your presence efficiently on the internet and social media, you can ensure successful marketing of your event. The check-list that follows will help you leave stronger virtual footprints and market your event better.

☐ **Event Website (Know why an event website is necessary [here](#))**

- ☐ Main Purpose of the event
- ☐ Perks of attending the event
- ☐ Event date, time and venue
- ☐ Speakers' list and bio
- ☐ **Registration Portal**
 - ☐ Attendee Registration Portal
 - ☐ Exhibitor Registration Portal
- ☐ Sponsor Logos
- ☐ Organisers' details
- ☐ Contact Details
- ☐ Event Application

(Know about the must haves of an event website [here](#))

☐ **Online Registration Forms**

- ☐ Platform Required
- ☐ Payment Gateway
- ☐ **Registration Fields**
 - ☐ Basic Personal Information
 - ☐ Basic Contact Details
 - ☐ Choices related to the event (For e.g. Committee preferences if you are hosting a MUN)
 - ☐ Accommodation Requirements
 - ☐ Transportation Requirements
 - ☐ Food Requirements (Including food preferences. For e.g.- Vegetarian/ Non- Vegetarian Food)
 - ☐ Confirmation Mail (A Confirmation Mail regarding the event registration)

☐ **E-mail Marketing**

- ☐ Draft the promotion mails to be sent
- ☐ Mail it to your existing clientele
- ☐ Mail it to the Potential Attendees' database

- ☐ **Social Media Campaigning** (On as many social media channels as possible)
(**Under- stand how to make the perfect social media strategy [here](#)**)
 - ☐ Post Pictures of event Venue
 - ☐ Post pictures of the key-note speakers
 - ☐ Create polls asking for attendee preferences
 - ☐ Post teaser videos related to the event
 - ☐ Go 'Live' during the event preparations
 - ☐ Publish articles and posts regarding your event
- ☐ **Promote the event on your company's blog**
- ☐ **Cross Promote it on the blogs and social media channels of your sponsors and associate**



10 THE BIG DAY

THE FINAL EFFORTS FOR SUCCESS

No matter how systematically you have planned, executed and worked for the event, if you mess up on the big day itself, nothing is going to fix it. Find the check-list that follows and be sure that it is fully marked on your event day so that nothing stays in trouble.

☐ **Document Checklist**

- ☐ Detailed Event Schedule is prepared
- ☐ Guest List is complete
- ☐ Exhibitors List is ready
- ☐ Permits, licensing documents, etc. are all in hand
- ☐ Site Map and copies are available
- ☐ Exhibition Plan is ready
- ☐ Seating Plan is ready
- ☐ A list of contact numbers of all the vendors is available

☐ **Site checklist**

- ☐ Seating, staging, etc. are in place
- ☐ Vendors have delivered their respective supplies
- ☐ All the stands have been put up perfectly
- ☐ Necessary technical equipment are in order
- ☐ Catering Requirements are available
- ☐ Event and Sponsor Banners are in place
- ☐ Guests have an access to Wi-Fi (if required)
- ☐ Emergency requirements are available
- ☐ Security officers and security requirements are available
- ☐ Parking Plan is in execution
- ☐ Copies of event schedule are ready for speakers/guests and attendees
- ☐ Documentation is in order
- ☐ Extra Parking permission is available

☐ **Staff Checklist**

- ☐ All the staff members are present
- ☐ Travel, accommodation and catering requirements of the staff are in order
- ☐ Staff has copies of site map and event schedule
- ☐ Staff members have the exact information regarding their duties
- ☐ Staff members have walkie talkies to stay connected with each other

☐ **Information Booth**

- ☐ Map of the venue should be available
- ☐ Program Schedule in printable format should be available
- ☐ Directions to different halls and Toilets should be known
- ☐ Internet Password is available

☐ **Business Centre**

- ☐ Ability to print papers
- ☐ Equipped with all stationary
- ☐ High Speed internet Zone

☐ **Networking Centre**

- ☐ Details of the Attendees should be available
- ☐ Ability to connect people with each other on the go

☐ **Social Media Presence**

- ☐ Keep Posting the event pictures
- ☐ Live stream some parts of the event on social media
- ☐ Announce the event hash tag
- ☐ Tagboard for showcasing live social media engagement
- ☐ Live streaming the event on the event website

☐ **Audience Engagement**

- ☐ Take real-time feedback from the users
- ☐ Indulge them into interactive questionnaire and quizzes
- ☐ Create activities which allow the attendees to interact with each other
- ☐ Sponsor kits, innovative gifts for speakers



11 POST EVENT

THE AFTER STORY AFTER THE EVENT

To an efficient event organiser, the end of an event doesn't mark the end of his/her job. From feedback to follow-up, there is still some work left that needs to be done. Go through the check-List that follow to ensure that your post-event work is done properly.

- ☐ **Feedback** (Find out ways to collect the perfect feedback here)
 - ☐ Create a feedback survey form
 - ☐ Mail it to the attendees
 - ☐ Post it on social media channels
 - ☐ Analyse the feedback received for finding your pluses and minuses.
 - ☐ Feedback taken through the networking platform as well
- ☐ **Follow-up**
 - ☐ Post the Videos and Pictures of the event on Social Media
 - ☐ Publish the event report on your company's and sponsors' blogs
 - ☐ Send a follow-up mail to the attendees greeting their presence and sending the success report of the event
 - ☐ Post event pictures and videos are on the event website as well



We **tech-care** of your events



Event Website



Event App



Event Ticketing



Networking



Event Analytics



Contact Us:

Meghna Mittal

+91-9099197091

meghna@hubilo.com