



# Corporate Event Planning Checklist

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To plan the perfect meeting, use this comprehensive checklist, with a timeline based 12-months.

## Twelve to Nine Months Before

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| <input type="checkbox"/> Start a meeting folder or binder. Select type of meeting, location, theme #of guests, time of day. | <input type="checkbox"/> Hire a meeting planner.                     |
| <input type="checkbox"/> Work out your budget and refer to it monthly.  | <input type="checkbox"/> Reserve your date and venue.                |
| <input type="checkbox"/> Determine color scheme and theme.  | <input type="checkbox"/> Book your speaker.                          |
| <input type="checkbox"/> Start the guest list for special guests.   | <input type="checkbox"/> Promote meeting/event on company website.   |
|   | <input type="checkbox"/> Create registration link for meeting/event. |



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## Eight Months Before

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- Hire the photographer/videographer.
- Contact potential sponsors and invoice.
- Meet & select caterer.
- Reserve a block of hotel rooms for out-of-town guests including speaker.

## Seven to Four Months Before

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- Create online invitation.
- Conference call with guest speaker to discuss topics and day of meeting/event.
- Inform and register presenters
- Reserve structural and electrical necessities.
- Arrange transportation for guest speaker to and from airport as well as hotel.
- Start composing a day-of timeline.

## Three Months Before

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- Finalize the menu.
- Order or create welcome basket for guest speaker, if desired.
- Order awards/plaques/gifts
- Do a walk-thru of the venue and finalize meeting details
- Create and print meeting programs.
- Send your event schedule to the vendors.

## Two Months Before

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- Touch base again with all the vendors.
- Meet with the photographer/videographer.
- Send out/Email the invitations.

## One Month Before

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- Check registration and send-out a mass email to all members/guests
- Request items needed for meeting – US Flag, lectern etc.
- Order audiovisual equipment – wireless microphone, projector etc.
- Send out final payments to any vendors.
- Contact sponsors to review meeting and request list of guests. Check to make sure sponsorship has been paid.
- Begin creating script
- Request formal introduction from guest speaker

