

# THE ULTIMATE CORPORATE EVENT PLANNING CHECKLIST:

## An Interactive Checklist for Planning an Unforgettable Corporate Event

Planning and executing a successful corporate event is no simple task. It's typically a months-long process consisting of several stages and a variety of steps. We've put together this complete corporate event planning checklist to help you ensure that you're covering all the important bases and lining up the resources you need to pull off an impressive event.

Below, you'll find a checklist with action steps for each aspect of corporate event planning, encompassing everything from pre-event planning to food and beverages, post-event follow-up, and more.

### Pre-Planning: Action Steps

- Goals and Objectives:** Determine the overarching goal and the primary objectives you intend to meet by holding this event.
- Appoint a Planning and Promotional Team:** Major corporate events are rarely a single-handed effort. Appoint a planning team and allocate responsibilities.
- Establish a Schedule for Planning Meetings:** Together with your planning committee, establish periodic meetings to review planning and further action steps.
- Determine Dates:** Decide on the date(s) when the event will take place. Are you hosting a single-day event or a multi-day conference? Consider your attendees' other seasonal demands that may make attendance challenging during certain times of the year.
- Budget:** Prepare a preliminary budget, categorized to allocate a portion of the budget to specific purposes, such as venue rental, staffing, promotion, food and beverages, speaking fees, printing costs, etc. What are your funding sources? If you need to request funding, make sure that funding is secured before progressing to the later stages of planning.
- Nametags, Badges, and Tickets:** Have badges prepared to identify staffers (some corporations opt for t-shirts), as well as name tags for attendees. Print tickets, and determine how attendees will be admitted to different areas. You might opt to have each attendees' track printed on a name badge, for instance, which allows them admittance to those areas at appropriate times. In other cases, you might sell tickets solely for access to the exhibition hall, and you'll want an easy way to distinguish those attendees from main conference guests.



## Registration and Sponsors: Action Steps

- **Establish Registration Procedures and Fee Schedules:** Determine a cost of attendance, unless you're hosting a free event. Establish registration policies and procedures, including registration methods, deadlines, etc.
- **Establish Procedures for Submission and Selection of Papers, Proposals, and Speakers:** If you'll be enlisting outside speakers.
- **Establish Procedures for Vendor Registration:** If you're allowing vendors to exhibit at the event, you'll need to establish procedures and registration processes to allow vendors to secure space, pay registration fees, and request any special needs such as additional exhibit space, access to electrical outlets, etc. Keep in mind that space will be limited, so this is a step that you may need to revisit after securing a venue.
- **Solicit Sponsors:** If your event will be funded in part by corporate sponsors, establish policies and procedures for soliciting and signing up event sponsors. What will your sponsors receive in return for their sponsorship? Often, this includes on-site advertising, mentions in promotional activities and collateral leading up to the event, exhibit space, and speaking and workshop opportunities.

## The Venue: Action Steps

- **Determine Your Rental Budget:** Some venues offer seasonal pricing, so the rental cost may be lower during certain times of the year. Find out what the costs are for your venue of choice on your desired date(s). If your dates are flexible, you may be able to secure a better deal at your venue of choice.
- **Create a List of Requirements:** What are your venue requirements? Consider whether you need a lecture hall, space for vendor exhibition, the targeted number of attendees, and other needs. If your event is a multi-day event, you'll want to consider a venue with hotel accommodations in close proximity for the convenience of your attendees. If you're hosting an event with several tracks and breakout sessions, you'll need a venue with multiple rooms.
- **Compare Venues and Negotiate:** Generally, you'll want to compare multiple venues to get the best cost and the required space. Some vendors may include tables, chairs, and A/V equipment with the rental fee. In other cases, you may be responsible for renting these items from a third party or for an additional fee from the venue. Make sure you're aware of all the specifics for a thorough cost comparison and analysis.
- **Layout the Space:** After securing a venue and getting information on the space that you have available, you'll need to plan a layout. Where will the main conference take place? How many attendees will need seating? Will attendees be seated in rows or at tables? What about the exhibition hall? After getting vendor registrations, you'll need to diagram the space to allocate adequate space for each booth and ensure that vendors are in close proximity to any requirements, such as electrical outlets.



- **Verify Materials and Equipment Needs:** On the day before or morning of the event, conduct a walk-through to ensure that all speakers and leaders have access to the appropriate space and that all audio-visual equipment and other needs are readily accessible.

## Lining Up Speakers and Lecturers: Action Steps

- **Line Up Speakers:** After receiving proposals, your event planning committee will need to select a keynote speaker and any lecturers or experts for workshops and breakout sessions.
- **Assess Requirements:** If speaker proposals do not already include information about what the speaker requires, such as audio-visual requirements, space requirements, and other needs, send a questionnaire to assess needs for each expert.
- **Line Up Requirements:** Now that you know what your experts need to deliver their presentations or lead their workshops, you can start lining up those resources and assigning venue space as needed. For instance, a speaker leading a breakout session will need time and space allocated separate from the main conference area.
- **Fees and Travel:** Are you compensating your keynote speaker and other experts for their time? Are they traveling from out of the area, and if so, are you covering their travel expenses, lodging, and meals? Prepare a speaker contract that outlines what your organization is responsible for and any and all fees and reimbursements for each guest expert.

## Promotion and Engagement: Action Steps

- **Develop a Promotional Plan:** Determine how you'll promote the event. Your promotional plan may include social media marketing, email marketing, direct mail, advertising in industry publications, and other tactics. On-site advertising should also be included in your promotional plan, which includes signage, banners, flyers and brochures, and other collateral.
- **Find Ways to Engage Potential Attendees Before the Event:** You can boost sign-ups and ticket sales by getting creative with pre-event promotions. Offer free ticket giveaways, social media contests, and a countdown to the event, for instance.
- **Offer Early-Bird Discounts to Encourage Early Sign-Ups:** You'll encourage potential attendees to sign up early if you offer a discount for early registration.
- **Publish Event Schedules, Sponsors, and Speakers:** You'll want a strong web presence in the months leading up to the event to encourage sign-ups. If you've lined up a world-renowned keynote speaker, for instance, make this information prominent on your website and social media promotions, as it will encourage ticket sales to those who want an opportunity to hear your keynote presenter.



## Planning Activities: Action Steps

- **Make a Complete List of Activities:** Make a list of all activities, including lunches, workshops, talks, dinners, and breakout sessions, that will take place during the event. Consider introductions and icebreakers, workshops, time for visiting the exhibition hall, keynote speakers and other lecturers, periodic breaks, lunch, closing statements, evening get-togethers, and other activities.
- **Prepare an Event Timeline:** Prepare a comprehensive event schedule including all activities, allowing adequate time between sessions and activities for transitioning, as well as for any potential delays or technical difficulties. A buffer of 10 minutes between events is a good starting point.
- **Create Timelines for Each Event:** After preparing the main corporate event schedule, you'll also want to prepare an individual checklist and schedule for every individual activity. For instance, a schedule for the keynote speaker may include time allocated for an opening statement, audio-visual setup time, the time the speaker requires for the presentation, time for a Q&A session at the end of the talk, and more.
- **Prizes and Engagement:** To keep your attendees engaged, you should consider interactive social media campaigns, such as a dedicated event hashtag, live blogging/tweeting, featuring interviews with vendors and attendees via Facebook Live, door prizes and giveaways, and other activities that can boost engagement throughout the event.
- **Prepare Promotional and Printed Materials:** You'll want to provide printed materials for attendees, and speakers and workshop leaders will likely have materials to provide to attendees, as well. Make a complete list of all collateral needed, including a master event schedule, information from sponsors, presentation materials, and any materials guest speakers and workshop leaders require. Create a checkpoint on your master schedule for confirming final materials, and get them printed about a week prior to the event.

## Refreshments and Accommodations

- **Reserve Accommodations:** If your attendees will be traveling from out of the area, they'll need accommodations. Make it easier for your attendees to reserve convenient hotel accommodations by reserving blocks of rooms that attendees can book. By doing so, you might be able to secure a discount for attendees.
- **Transportation:** Make it easy for your attendees to get to the venue by providing information on public transportation options from the airport to nearby hotels, as well as directions for those traveling by car.



- **Refreshments:** You'll want to provide refreshments throughout the day for attendees, including water, coffee and tea, and light snacks such as pretzels, muffins, cookies, and other easy-to-eat snacks. Find out if your venue has existing contracts with catering companies – you may be required to use these businesses in some cases, while in others, you may get a discount on catering due to the pre-existing relationship between the caterer and the venue.
- **Meals:** Will attendees be responsible for their own breakfast, lunch, and dinner during the event? In some cases, attendees are responsible for some meals (such as breakfast or dinner), while the event provides lunch. You might provide dinner for attendees if formal activities are taking place during this time, such as an awards ceremony.
- **Plan Menus:** Well in advance, you'll want to determine the specific beverages, refreshments, and meals that will be provided and when. Decide whether to have table service or a buffet-style meal. If you're offering guests an option of several meal choices, make plans to get those preferences weeks prior to the event to give your caterer plenty of time to prepare.
- **Special Dietary Needs:** Consider special dietary needs when planning refreshments and meals. For instance, if providing a meal, it's best to provide a vegetarian or vegan alternative as well as a main option.
- **Alcohol:** Will you serve or permit alcohol on the premises? If so, will you be paying for attendees' alcoholic beverages? An alternative to footing the entire bill is making a cash bar available during meals, covering only the food and non-alcoholic beverages but making cocktails, beer, and/or wine available to attendees who prefer it.

## Staffing: Action Steps

- **Security:** For any major event, security is an important consideration. If your venue is a hotel, the hotel likely has security staff on hand to monitor the premises. However, you'll want to consider having dedicated security staff from your own organization as well. Alternatively, you can hire an outside event security agency or utilize on-demand staffing services to line up security personnel to keep your attendees safe. You should have security personnel at the main entrance, as well as security staffers who can patrol the perimeter of the event.
- **Catering:** A catering company will provide staff to serve guests, keep the refreshments area well-stocked, and prepare refreshments and meals. However, if you're providing your own refreshments, you'll need to put staff in charge of these responsibilities. On-demand staffing is a convenient option if you need additional hands on deck.
- **Registration and Attendee Services:** Additionally, you'll want to ensure that you have adequate staff on hand during the event to handle attendee registrations, help your attendees navigate from place to place (particularly for multi-room events), register vendors and assist with vendor setup, and to generally ensure that your attendees are happy and enjoying themselves. On-demand event staffing is a convenient way to quickly enlist the additional staff you need to ensure that your event goes off without a hitch.



## Post-Event Engagement: Action Steps

- **Post-Event Engagement:** Follow up with speakers, vendors, and attendees following the event to thank them for attending.
- **Post-Event Promotion:** You can get tons of traction from events long after they're over by continuing to publish interviews, videos, wrap-up reports, and key takeaways from the event as a whole as well as individual sessions.
- **Conduct Surveys:** If you're planning to host the event annually, a post-event survey is imperative to find out where you fell short, what went well, and what areas to focus on to make your next event bigger and better. Even if you won't be hosting the same event again, this type of feedback is useful for future event planning.
- **Discounts and Offers:** If you'll be hosting future events, offering attendees and vendors a discount on future registration is a great way to thank them for attending and give your next event an early registration boost.