Event Checklist

*(Save this document with the event name and date so you can always return to this template.)*

Event Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Event Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Arrival Time:

Contact person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mandatory Attendees:

Speaker Yes No

Speaker Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Info: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Prepare for Event Actions

* Confirm location/venue availability on the selected day/time
* Get Directions/Parking info.
* Will attendees need to pay?
* Determine the image you want your communications to convey, then choose designs and formats to give your event a cohesive look.
* Event Theme?
* Determine the goals and objectives of your event
* Determine how much you want to spend. Budget amount for food for this event: $\_\_\_\_\_
* Determine key vendors and contact them to secure the date/time
* Initial E-mails or calls to ID if key people, needed to attend are available, secure the date/time
* Send out invitations or e-vites
* Raffle? Gift Bags? Place requests/orders well in advance of the event.

## Pre-Event Actions

* Secure sponsors with initial letters and follow-up calls

Raffle? Ask Sponsors for donations

* Select avenue for publicity
  + Create a website and promote via the internet/social media, as appropriate
* Distribute Directions/Parking info to attendees
* Tables, chairs, canopies?
* Create an agenda (final review with leadership)
* Send a reminder E-mail the week of the event, possibly with the agenda attached
* Final reminder call to event guest speaker before the event to ensure we will have what they need

Prepare to Bring

Expo Box with – enough paperwork for expected attendance:

* Banner
* Contact Info Slips
* Marketing flyers with QR code to website & lots of pictures
* Business cards
* Handout(s)
* Raffle Tickets
* Raffle Ticket container
* Cash box with some small bills for change. If there are keys bring them, and give a key to each person working with cash.
* Additional event supplies container (tape, scissors, string, clips, clipboard, paper, pens, paper, and/or binder clips) think through what you might need especially for outdoor events where there may be wind, sun, rain...
* Personal Care items (phone charger and/or backup battery, water, snacks, hat, sunglasses, sunscreen, chapstick, hand sanitizer, lotion, light jacket)

Table Display

* Ask about the Internet and Power if needed for computers, signs, display
* Display board (how will it be secured if it is windy?)
* Table cloth
* Flyer holders/stands
* Business Card Holder/stand
* Computer
* Projector
* Screen
* Extension cord

Day of Event Actions

* Arrive early to the assigned location and secure a good spot at the event (chairs, tables, food, products…)
* Post identifying signage and posters including arrow signs for non-obvious locations
* Meet the event guests before the event to ensure they have what they need
* Greet event guests as they arrive distributing any handouts, and agenda, directing them to food, and answering questions.
* Prepare name tags, place cards, awards, and/or signage.
* Set up exhibits or displays.
* Keep the meeting/event on schedule within the allotted time!!! Even if slow stay for the entire event time slot. Lots of good business happens before and after events.

Post Event Actions

* Clean up after the event
* Return all rented or borrowed equipment.
* Send thank you notes to everyone who worked with/for you. Selecting a note card that coordinates with your event theme or is personalized is nice.
* Return to this document and make notes about the complete event to make it easy to do the next event.
* What worked well at this event…
* What needed to be done differently to improve this for your next event…

*Sometimes there are events you should not do again, be brave and try other events is this one didn’t work well.*