



The Ultimate Event Planning Guide



Every little detail. G2 has you covered.



Event marketing is all about the details. To be successful, you must have a mind for project management, and the ability to keep an eye on the little things. Whether you are new to **event marketing or an experienced pro, never underestimate the power of an event planning checklist.**

G2's Ultimate Event Planning Guide gives you a tangible way to ensure nothing is forgotten. There's no going back once the event day arrives; a checklist is essential to ensure everything runs smoothly. Whether your event is many months away or right around the corner, use G2's Ultimate Event Planning Guide to drive attendees and wow every single one.

So, let's get planning!



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Start by deciding on your event's objective. What's the goal? What budget do you have to execute that goal?

Before you can create your event website or promote your event, gather the basic details like date, time, and location.

The first steps in your checklist: As soon as you begin planning

First Steps:

- Decide your event goals.
- Determine the budget.
- Brainstorm an event theme.
- Research speakers and entertainment; reach out to those who fit your goals.
- Find **event venues**, research pricing, visit potential locations.
 - Check for any contractual requirements – do they have a food and beverage minimum?
 - Ensure venue has necessary licensing for alcohol if needed.
 - Be aware of accommodations for people with disabilities.
 - Look into parking and transportation options.
- Set your sponsor levels and packages.
- Compile a list of potential sponsors; solidify and send sponsor proposals.
- Lock in the event date. (Make sure there are no similar industry events on the same day!)
- Decide if you will hire an **event management company** to assist you.

Three-to-six months before the event

Now that you've got the foundational pieces in place, it's time to continue communicating with event partners, speakers, and sponsors. The other major steps include building your event website or landing page (so guests can register), and beginning to promote your event.

The steps to execute three-to-six months before your event include:

- Establish who on your team will be responsible for what tasks.
- Outline your marketing and publicity schedule.
- Confirm speakers and entertainment, continue sourcing if needed.
- Source speaker headshots and bios for your website.
- Lock in sponsors, continue reaching out to more if needed.
- Send sponsors contracts, keep a detailed file of signed contracts and the benefits you are providing them.
- Meet and coordinate with any event partners or co-hosts.



Quick Tip:

The timeline to begin this process will be affected by the size of your event. A large conference that runs for several days will have a higher cost for attendees. This means you should start promoting your event months in advance. If your event is a single-speaker session, you won't need as much lead time on your event promotion.

- For a large event, decide if you will use an event app. If so, begin compiling content for your app, including:
 - Sponsor logos
 - Speaker headshots and biographies
 - Surveys questions
 - Live polls during sessions
 - Event location and lodging
 - Pricing and registration
 - FAQs
 - Exhibit hall maps
- Finalize event branding and design - theme, logos, colors, etc.
- Book the event on all internal employee calendars.
- Confirm ticket fee you will charge.
- Acquire any required permits or licenses.
- Establish the agenda. Include time for:
 - Registration
 - Presentation(s) or entertainment
 - Q&A
 - Breaks
 - Networking and refreshments
- Plan the venue layout, including space for:
 - Presentations
 - Catering
 - Speaker rooms
 - Sponsor booths
 - Registration
- Decide if you will do any paid advertising, such as retargeting or display ads.
- Brainstorm and plan event decorations.

- Research any required event suppliers. This includes printers, caterers, photographers, audio/visual, or videographers.
 - Ask contacts for recommendations or read vendor customer reviews to ensure the quality of their customer service.
 - Look into pricing: Will they fit into your budget? Do more expensive suppliers provide more value?
- Make your shortlist and check vendor availability.
- Build any shared documents for your team, such as:
 - Event sponsor fulfillment: This is where you will keep track of what benefits each sponsor will receive throughout the event promotion and on the event day. Be sure to include contact information.
 - Speaker information: This is the source for all speaker details, including contact information, presentation topics, permission to share their slides and speeches, special requirements, and any other details.
- Negotiate a deal on a hotel block for out-of-town guests.
- Create your event website and ticket registration process.
- Announce and promote your event.



Creating your event website and registration

Once you've secured your venue, lined up a few speakers, and locked up your entertainment, it's time to **make a website** for your event.

Consider your event website the hub for your guests. They can find additional information and register.

Unless you are working with an event management agency that is handling your registrations, this will involve two stages.

1. First, set up your event on an **event registration and ticketing** platform.
2. Then, create a landing page on your own company's website.

Setting up the registration process

- Choose your event ticketing and registration platform.
- Create an account with that platform.
- Add your logo, event details, capacity numbers, and pricing.
- Check for any automated settings within the platform. For example, will an email automatically be sent to event registrants? If so, do you need to adjust the text? With your CTA, include a link, button, or form to register through your event registration software.

Creating your event landing page

- Write your event description.
- Include the date, time, and venue.
- Upload your speaker or entertainment headshots and biographies.
- Ensure you have a strong call-to-action (CTA) to register.
- With your CTA, include a link, button, or form to register through your event registration software.



Announcing and promoting your event

Once your website is published, it's time to announce and promote your event. Be sure to include a link to register any time you share the event across all channels.

The basic steps to announce and promote your event are:

- Write and distribute an event press release. Learn [how to write a press release](#) for those who are beginners.
- Send an email to your database. Consider offering early bird pricing.
- Share the event on all relevant social media channels:
 - Twitter
 - LinkedIn
 - Facebook
 - Instagram
 - YouTube
- Ask speakers to share the event with their followers. Give them personalized discount codes.
- Begin any paid advertising.



Quick Tip:

You should send an email to your contact database and share the event on social media for any size event. For larger events, consider mixing in a press release and paid advertising as well.

One-to-three months before the event

One-to-three months before the event, your action items are:

- Regularly check registration numbers on your event registration platform:
 - Are you getting close to capacity?
 - If not, do you need to invest more time in promotion?
 - How much revenue is coming in?
 - Have any special requests been sent through on the registration platform?
- Book flights and hotels for staff; record all travel information in a shared document.
- Confirm and record flight and accommodation arrangements for your speakers.
- Hold regular meetings with your event planning team.
- Reach out for event volunteers.
- Execute event app details:
 - Finalize and add content to the app.
 - Test your event app on both Apple and Android devices.
 - Publish the app and **promote it to event attendees.**
- Send monthly event reminders to your database; remind them of any price promotions that are ending.
- Continue announcing any major new speakers or entertainers at your event.
 - Add new presenters to the event website.
 - Create press releases and send emails for headliners who hold influence.



Do you feel it? You're gaining momentum!

Some of the most important steps at this point include making sure your sponsors, speakers and event suppliers are 100% confirmed.

And, of course, this is the prime time to continue **event promotion!**

- Continue sharing your event on all social media channels.
- Provide your company employees and speakers with regular social media content to share.
- Order any desired **event swag**.
 - Get sponsor approval on any branded items. For example, a company may be the sole sponsor of the swag bag or official event notebook. Make sure they approve the use of their logo.
- Continue to nurture and book potential sponsors who have not signed.
 - Add any new sponsors to the event website and your sponsor fulfillment spreadsheet.
- Order event decorations.
- Confirm load-in details with the venue. Provide sponsors with any shipping details.
- Write the copy for any event collateral, such as the event signage and program.
- Finalize and confirm event vendors, including:
 - Catering
 - Photographer
 - Audio-visual
 - Videographer
 - Printer
 - Equipment rentals (any tables, chairs, linens, temporary staging, etc.)
- Work with design team on any printed materials:
 - Venue map and directions
 - Other event signage and banners
 - Agenda and program
 - Seating chart
 - Menu
 - Name badges
- Continue to check registration numbers.

The month leading up to the event:

The activities to execute the month before your event are:

- Cross check contractual fulfillment of sponsor requirements:
 - Do you have confirmation of swag bag items from sponsors?
 - Is each sponsor's logo on all printed and digital event materials?
 - Are sponsor booth details and special requests confirmed?
- Confirm there will be enough outlets and charging stations.
- Email attendees for dietary requirements.
- Discuss speaker topics and finalize any details.
- Finalize catering menu.
- Ensure volunteer and employee meal arrangements are made.
- Create and send production briefs to your videographer or production company.
- Email sponsors any new instructions and agenda information.
- Confirm event venue's Wi-Fi capabilities, make sure any passwords will be visible to attendees or vendors.
- Delegate event day tasks to employees.
- Invite board members and VIPs to introduce speakers and conduct Q&A.
- Finalize, proofread, and order printed materials.



This is crunch time for communicating with your event partners. When you are working with so many other individuals (such as speakers, sponsors, and vendors), it's easy for someone to forget a detail you discussed during the beginning stages.

Quick Tip:

Continue to have regular meetings with your team and any event partners. Time is going to fly; don't wait until the last minute to remind sponsors what you need from them or order materials.

One-to-two weeks before the event:



In this busy period, your to-do list items are to:

- Write scripts for any introductions or speeches.
- Create holding and presentation slides.
- Ship any needed materials to the event venue.
- Source and register any unknown attendee names:
 - If your sponsors have been given tickets to the event, confirm and register the employees who will be attending.
 - If you've had group registrants, or "tables of 10," get registration details for those individuals.
- Register speakers – they need name badges too!
- Pack swag bags.
- Assign tasks to volunteers such as:
 - Scanning name badges.
 - Welcoming guests and conducting registration.
 - Holding signs to alert speakers of "five minutes remaining" during their presentations.
 - Directing guests where to go.
 - Monitoring rooms.
 - Handing out swag.
- Send volunteers and event staff reminder emails and any training materials.

By now anything not related to the event will have fallen to the bottom of your to-do list. That's not a bad thing; that's the way it works in event marketing!

Digging your heels in and working hard now will ensure minimal stress in the final days before your event.



Planning checklist for the week leading up to the event

Crunch time has officially hit! The days are long and the nights are short, but hopefully you have enough excitement and adrenaline to keep you going.

The items to activate this week are to:

- Create and send your event run sheet (also known as a production schedule) to:
 - Your company's employees
 - Speakers
 - Volunteers or temporary staff
- Test the size and compatibility of your holding and presentation slides:
 - Are your fonts compatible with other devices? Your PowerPoint or Google Slides could look completely different on a computer that doesn't have your font installed. If possible, save your presentation as a PDF to overcome this.
 - Is your presentation document the same dimensions as the presentation screen? Double check to make sure they are both 4:3 or 16:9.
- Contact and send reminders to all event suppliers. Send them the run sheet, and confirm directions and arrival time.
- Send final attendee numbers to your caterer and venue.
- Ensure you have all speaker presentation slides; test them for compatibility.
- Send event reminder email to guests. Include directions and the agenda.

This week will be full of the final event details. Usually, an event involves so many moving parts that you can't execute tasks such as creating your run sheet or name badges before this period. Otherwise, the details will change and you will have had to do it twice!

- Create and print **name badges**.
- Send any dietary requirements to your event venue or catering company.
- Finalize any on-site training for **trade-show booth** staff and volunteers.
- Print hard copies of your documents:
 - Running order
 - Contact sheet
 - Attendee list
 - Social media checklist:
 - "Must do" mentions
 - Sponsor and speaker handles
 - Relevant hashtags
 - Any other internal agenda and documentation.
- Put holding and presentation slides on a USB stick.
- Send your photographer a shot list of necessary pictures.
- Wrap speaker gifts.
- Check in for flights if needed.
- Pack your event toolbox. (Keep reading for a checklist of items to include!)

The day of the event checklist



The day has finally arrived! Take a moment to reflect on what you've accomplished so far. That feeling when you walk into the event venue... drink it all in and embrace the moment!

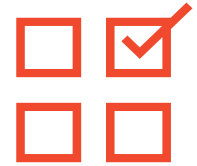
Your event day kit

Items for your event day toolbox are:

- Printed lists of attendees
- Printouts of your running order
- Label maker or portable name badge printer
- Batteries for label maker or charger for portable printer
- Extra tape for label maker
- Your alphabetized badges for all guests and speakers
- Blank labels/name tags to print on at the event
- Extra name badge holders
- Sharpies
- Any banners or other event signage
- Laptop
- Laptop charger
- Phone charger
- Backup USB with holding slides
- Post-it notes
- Tape and sticky tack
- Scissors or box cutter
- Paper and pens
- Camera
- Advil or Tylenol
- Media wall
- "Reserved" signs (Use these for VIP guests to sit up front. Or, put them on the chairs in the back, so late arrivals have a place to sit).
- Cling wrap and containers for leftover food
- Printed social media sharing checklist
- Mints or gum
- Safety pins
- Band-Aids or first aid kit
- Speaker gifts



Event day activities checklist



With your event day kit packed and ready to go, you'll be ready for each of the following:

When you arrive:

- Arrive early for a venue walk through.
- Touch base with your event venue point of contact.
- Respond to any sponsor on-site questions or problems.
- Set up any banners and your media wall.
- Check on catering; ensure dietary requirements are taken care of.
- Get your holding slides loaded and tested.
- Test the sound equipment, including individual lavalier mics.
- Put up any event signage to direct attendees.
- Set up registration table and name badges.
- Conduct a final audio/visual check.

Throughout the day:

- Assist speakers and sponsors as needed.
- Greet guests, especially VIPs.
- Guide presenters from speaker room to their presentation rooms.
- Get speakers mic'd up.
- Share event images and quotes on social media.
- Take pictures of the event, or ensure your photographer is executing the required shot list.
- Make sure speaker water glasses are full.
- Guide guests back into presentation rooms following breaks.
- Assign yourself or another leader to be ready for troubleshooting.
- Remember to eat. (And breathe!)



Post-event checklist



In total, your post-event action items are:

- Thank speakers and sponsors.
- Work with production company/videographer on post-production edits.
- Update contacts in your **CRM software**.
- Pay any outstanding invoices.
- Write and send your **post-event survey** to attendees. Remember to:
 - Analyze post-event survey results.
 - Send event sponsors a separate survey giving feedback on their experiences.
 - Compile data for sponsors, your CEO, and the board.
 - Choose testimonials to share with these decision-makers.
- Update your event website:
 - Change the event to a “past event” instead of “upcoming.”
 - Upload event photos.
 - Update copy to be past-tense.
 - Add any speaker presentations and videos.
- Team debrief: discuss and document what worked and what didn’t.
- If survey was incentivized, select and notify winners.
- Compile and send executive summaries (also known as sponsor reports).
- Reconcile any accounting documents – did you make a profit?

The event is over. Take a deep breath and recognize your hard work! While the storm has passed, it is essential to do the post-event processes as soon as possible.

Pro Tip:

The best way to keep your attendees engaged is to ask them for feedback. Surveys should be sent and conducted while reactions are fresh in the minds of your attendees.



And there you have it – the ultimate event planning guide. You have now completed all action items and executed your event with relative ease! Yes, the list is long. Yes, it looks overwhelming. But in reality, this list ensures you've left no rock unturned and gives you peace of mind for any event.

From the benefits of event marketing, networking, name badges and choosing your event venue, G2 has you covered.

Event Marketing Resources

- What is **Event Marketing** – Understanding the Basics
- The Top Six **Benefits of Event Marketing**
- The Best Ten **Types of Events** Utilized by Marketers
- How to Start **Planning an Event**
- How to **Promote Your Event**
- 9 **Event Networking** Tips Anyone Can Implement
- The Ultimate List of 50+ **Resources for Event Marketing** Professionals
- How to **Create Event Name Badges** (Minus the Headaches!)
- How to Write **Post-Event Survey Questions**
- **Event Venue Selection**: Checklist and Worksheet