

In-Person Event Planning Checklist



With so many steps that go into planning an event, just keeping track of all your to-do's can be a lot of work on its own. Use this actionable checklist to stay organized and efficient as you work through each phase of your event planning process.

Event Strategy

1. Determine the overarching goal and the primary objectives for holding this event.
2. Identify target audience and key take-aways.
3. Agree on how this event fits into your Total Event Program. What are its long-term objectives?
4. Appoint a planning team and allocate responsibilities.
5. Establish a schedule for planning meetings.

Event Budget

1. Make a comprehensive list of all budget line items in the event lifecycle.
2. Prepare a preliminary budget based on historic costs and supplier quotes.
3. Finalize event budget.
4. Settle the budget after the event and add in your actual spend.

Venue and Vendor Collaboration

1. Create event RFP.
2. Search for venues and vendors that fit your requirements.
3. Send RFP and compare bids.
4. Reserve accommodation and transportation requirements.
5. Plan event layout in an [event diagramming system](#).
6. Collaborate on event design with production, AV, and venue contacts.

Event Marketing and Promotion

1. Develop and activate an [event marketing plan](#).
2. Design event collateral including branding, signage, badging, and banners.
3. Prepare and print event collateral.
4. Launch event [website and registration site](#).
5. Design and send out invites.
6. Send attendees a "Know Before You Go" email 1-5 days before event start.

Find the perfect venue for your next event with the **Cvent Supplier Network**. Search over **300K global venues**, send RFPs, compare bids, and impress attendees. [Find venues for free.](#)



Event Logistics

1. Decide on the date(s) when the event will take place, keeping in mind religious and cultural dates.
2. Determine [Event Pricing Strategy](#)
3. Commission [mobile event app](#) and specify its functionality and purpose.
4. Build event agenda, which accounts for adequate transition time between sessions and any potential delays or technical difficulties.
5. Plan menus for meals and refreshments, taking dietary needs and environmental sustainability into consideration.
6. Confirm or recruit event staff.
7. Configure [technology to capture lead info](#) and pass data for follow up.
8. Set up push notifications and alerts that will be sent via the mobile app.

Speaker, Exhibitor, and Sponsor Management

1. Post Calls for Speakers, Sponsors, and Exhibitors.
2. Secure speakers.
3. Confirm sponsor involvement and value exchange.
4. Rehearse speakers and hybrid production elements.



Speaker, Exhibitor, and Sponsor Management (continued)

5. Set up Speaker Resource Center to collect speaker deliverables.
6. Set up Exhibitor Resource Center to collect exhibitor and sponsor details.

Post-Event Follow-Up:

1. Follow up with speakers and attendees to thank them for attending and check in on their experience.
2. Direct attendees back to [Attendee Hub](#)/content hub to consume post-event content on demand.
3. [Conduct surveys](#), secure feedback, measure ROI, and collate final costs for future reference.
4. For external events, deliver information about event attendance to Sales/Customer teams for post-event follow up and lead tracking.
5. Analyze post-event data to determine areas of success and opportunities for the future.

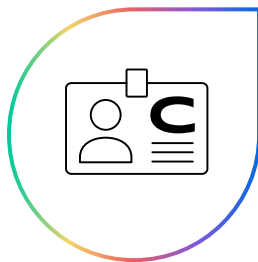
Need in-depth guidance on planning and executing your next in-person event? Then check out [The Ultimate Guide to In-Person Events](#).



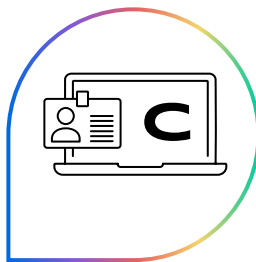


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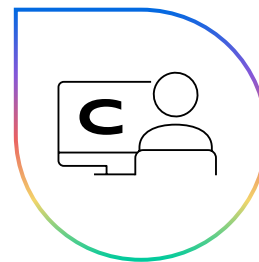
Cvent provides easy-to-use, integrated technology solutions to maximize the impact of meetings and events of all sizes. We help organizations plan and market events, execute onsite, engage audiences, and measure and analyze results.



IN-PERSON



HYBRID



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