

Onsite 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 on track 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 your target audience, a tone of voice for your event that will appeal to them, and what takeaways they will expect from your event.
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. Finalise event budget.

Venue and Vendor Collaboration

1. Create a list of venue requirements.
2. Compare venues and negotiate.
3. Reserve accommodation and transportation requirements.
4. Plan the event layout, including room capacities and overflow areas.

Event Logistics

1. Decide on the date(s) when the event will take place.
2. Decide how you will handle ticketing and whether or not registrants will need to pay for access or premium content.
3. Commission a mobile event app and specify its functionality and purpose.
4. Collaborate on event design with production, AV, and venue contacts.
5. Design and send out invites.

Event Logistics (cont.)

6. Prepare an event flow timeline, which accounts for adequate transition time between sessions and any potential delays or technical difficulties.
7. Launch registration and contactless ticketing.
8. Plan menus for meals and refreshments, taking dietary needs and environmental sustainability into consideration.
9. Confirm or recruit event staffing.
10. Action lead and data capture.
11. Push notifications and alerts via your mobile event app.

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.

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.

Post-Event Follow-Up:

1. Follow up with speakers and attendees to thank them for attending and check in on their experience.
2. Let speakers and attendees know what content will be made available on-demand and when.
3. Conduct surveys, secure feedback, measure ROI, and collate final costs for future reference.

