

# How to Create a Customized Event Planning Checklist

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Planning an event involves layers upon layers of details. From the pre-planning stage to the day-of-event logistics, there's a lot to keep track of. If you keep all those details in your head, the event day will undoubtedly be chaotic and stressful. To say the least, that's counterproductive.

A checklist for your event can make a huge difference! At the same time, no two events are the same, so there's no such thing as a one-size-fits-all event planning checklist.

Instead, we suggest creating a customized event planning checklist. This not only keeps you on target, but it will also provide essential information to the event team, who can work with you to execute an amazing event. Just follow these steps to create a checklist that will keep you on track and executing flawlessly.

## 1. Create your own event checklist template

As you create your checklist, put all the items into a template. You can create your own in Microsoft Excel or Google Docs, or find a template online. You can also use a project management app, such as Asana or Podio, that let you work collaboratively with your event staff.

Once you have a template, you can fill it in with specific to-dos as you think of them. Work backward from the event and create a timeline of tasks and a schedule of deadlines, which assures that every minute detail gets covered.

## 2. Establish the event essentials.

Next up is to determine some of the key elements of your event:

**Date and time:** Where will the event happen and what time? Consider how the date fits into attendees' schedules.

**Location:** Think about where the event is geographically (which city makes the most sense) as well as the venue. Create checklist items: Research, interviewing vendors, signing the contract, etc.

**Type of event:** Is it a conference? A party? You likely already know this, but it's good to write it down and communicate it clearly.

**Event goal:** The overall reason for hosting an event. For example, it could be fundraising, celebrating employee success, or launching a new product.

**Event objectives:** How will you measure you met the event goal? For instance, if the goal is fundraising, an objective might be to raise \$1,000 or receive 50 pledges of support.

**Audience:** You need to clearly understand what expectations attendees have of the event. If you don't meet their needs, then the desired guest action is less likely to happen.

Make each of these things a to-do item on your checklist to make sure you don't skip these steps.

## 3. Build your event budget.

When you think about every event expense, creating an event budget seems daunting. With a Microsoft Excel spreadsheet, it's not that complicated. Start with the major categories, such as catering, décor, and rentals. Then, breakdown all the expenses under each category and let Excel do the work for you.

Under this section of your to-do list, you can add smaller tasks like:

- Researching costs of rentals
- Contacting vendors for quotes
- Negotiating discounts with vendors
- Paying deposits

All that is to say: The event budget isn't a single checklist line item that can simply be marked off. Your budget is a living, breathing document, and this format encourages you to keep revisiting all aspects of the event until it is as cost-effective as possible.



For an event to be successful, you have to know your audience.

## 4. Create the event design.

This is the heart of event planning because it includes the event components that impact guests the most.

We'll go over some of the broad elements of event design. As you think about these, consider the specific tasks you need to add to your event checklist.

### Program

The program tells the story of the event goal and objectives. Each story element leads to the next story element, which builds anticipation during the event. The peak of that anticipation should be dramatic. It is what you want your guests to remember the most. An event checklist helps layout the story by breaking down the timeline of the event.

#### The program comes to life by:

- Planning the program agenda

- Mapping out the program timeline

- Hiring vendors or entertainers to bring the program to life

- And more

### Layout

How you're using your space — all the way down to the seating arrangements — can make all the difference. And we're not just talking about the seating chart: Consider the placement of electrical cords and bussing stations, for instance.

On your event checklist, include a task to visually laying out the event space. A user-friendly tool like Social Tables' Diagram can help you map it out and easily share your layout with clients and vendors.

## Theme

Choosing an event theme isn't just for fun. The theme represents the event message and serves other essential purposes, such as:

**Creating buzz.** The guests' event experience begins long before the event. A themed invitation and social media posts create anticipation and set the tone for the future event.

**Connecting the elements of your event.** A theme connects the individual event components (such as décor, catering, and entertainment), thereby layering the event message into a cohesive guest event experience.

**Making the event memorable.** If a guest attends an event with a '50s diner theme, the next time they see a diner on TV or eat a meal at a diner, they'll likely recall the diner-themed party. That also means they'll think of your business, product, or brand.

## 5. Plan out the décor.

Décor isn't just pretty — it's crucial for a successful event. And since it runs the gamut from rentals and florals to tablecloths and accent pieces, it can be a lot making sure that you're covering all your bases.

Your guests experience the event through their five senses, so make sure ask yourself what attendees will:

**See:** What visual elements can elevate your event? What type of lighting or decor will you include?

**Hear:** Will there be music? What about presenters or speakers? What should guests be listening for?

**Smell:** Even if it's in the background, smell is always there. Should guests smell candles, food, flowers, or something else?

**Touch:** Will guests interact with any elements of your event? And yes, picking up silverware or barware counts!

**Taste:** Food can make or break an event! More on food in a moment.

Once you plan out all these elements, add them all to the checklist: Hiring vendors, sourcing supplies, setting everything up and more.

## 6. Get creative with food and drink.

Food & beverage can be the most important components of an event because sharing a meal is a true community experience. Food is associated with nurturing, so this is an opportunity for the host to illustrate thoughtful hospitality.

The checklist for planning event food includes a lot. Here's just a sample:

- Researching and interviewing vendors
- Determining type of service [seated dinner, food stations, passed appetizers]
- Planning a menu around dietary restrictions

Your checklist helps you chart those nuances, so that you pick the perfect caterer, keep your menu on-trend, protect the planet, and, most importantly, leave your guests feeling nurtured and nourished.

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## 7. Hire entertainment and plan guest experiences

If you plan to hire speakers or entertainers, you need to add several items to your checklist. For example:

- Sign contracts
- Book hotel rooms for VIPs
- Set up transportation for VIPs
- Set up a green room
- Promote keynote speakers

In addition to speakers and entertainers, you'll also need to coordinate interim entertainment, such as:

- Photo booths
- Guest engagement stations
- Relaxation areas

Your checklist acts as a blueprint, helping you to see the big picture, while you are planting micro-experiences for your guests.

## 8. Map out your marketing plan.

Event marketing creates buzz, builds anticipation and guarantees a good turnout.

It can also involve a lot of details, like:

- Custom logos and branding
- Printed flyers
- Paid advertisements
- Dedicated event emails
- Social media posts
- Marketing budget

An event checklist will help map the pre- and post-event marketing strategy across all of those channels. This is where an online project management tool will be especially handy for you and your team.

## 9. Plan for little details and the unexpected.

It's the little details that make a big difference. That's why you'll want to keep track of every minute thing that can affect the guest experience.

Here are just a few things to consider:

If you plan to put directions on the event's website, make sure they are correct

What transportation options do guests have? Will there be parking?

How will you handle event registration? Will the lines get too long?

What about guest access to Wi-Fi and electrical outlets?

What if someone has a medical emergency?

Will there be signs to direct guests around the venue?

Do you have a plan for event security?

Those are the small, but very important details that need to be added to an event planning checklist.



## 10. Create a chart of event-day logistics.

Plan to create a logistics timeline for the event: a minute-by-minute schedule of everything from vendor arrival and set-up to run-through and post-event breakdown.

There are many moving parts on event day, and inevitably, unexpected situations will arise. If you don't have details outlined to a tee, you will miss something, which will show up later as a big problem. There's no need for that added stress when you can use your checklist to create a thorough day-of-event schedule.

**Pro tip:** You can create a visual layout of your event using space planning software and share it with catering staff and other collaborators before the event to cut down on potential mishaps.



Event design is the heart of your checklist.

## 11. Plan to follow-up after the event.

After your guests leave the event feeling all warm and fuzzy, touch base with them. This is an opportunity to reinforce the event message and get feedback, as well as prompt guests to take action to meet event objectives.

When putting together your list, contemplate a variety of post-event communication methods that will achieve those results, such as sharing event photos, sending a thank you note, posting on social media, or linking to event materials. The checklist will not only help you manage the tasks, but track the results.

## 12. Take time to debrief and write a post-event analysis.

Shortly after the event, you will want to sit down with your team, talk about what went right, and what can be improved. On an event planning checklist, you can list criteria to consider that will map back to your event goals.

That completed list of criteria will provide information for a comprehensive post-event analysis to be written. And, a post-event analysis will contribute to the return on investment report, where it can be determined if the event objectives were met.

This information is valuable in analyzing your skill as an event planner, reporting goal and objectives results to your company, and constantly building upon the success of each event.



Planning the buffet, placing the mics, laying it all out — it's not easy making the little details come to life. So in 2011, we set out to change the way events are designed by introducing better collaboration between planners and properties.

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## 6 – 12 months out

If your event has a lot of moving parts, add these items to your long-term event planning timeline:

- 1. Date and time:** Where will the event happen? Assign roles and tasks. Who is responsible for what, and when do they need to do it by? Keep track of this information with a spreadsheet. In the columns, indicate whether the task has been completed and add notes.
- 2. Establish event goals.** Your event goals and objectives pave the way for most of your decisions. It takes time to properly articulate goals that are both achievable and agreed upon by the whole team.
- 3. Determine the event budget.** Determining your event budget six to twelve months in advance helps keep your financials on track. It can also help give you an idea of what kinds of “extras” you can offer.
- 4. Choose your venue, caterer, and other main vendors.** Your venue might already have a list of vendors they work with — you can start there. If they don't, ask for their recommendations. Coordinating schedules and reserving a spot on their calendar now will help eliminate headaches in the future.
- 5. Make a plan for marketing and event promotion.** Decide how you'll market and promote your event. If you do this early in the process, you'll maintain a cohesive image. If you plan to offer presale tickets or registrations, decide on release dates.

## 3 – 6 months out

The tasks listed below require both research and getting responses from other stakeholders. That's why we suggest doing these these at least three months out. You'll have enough time budgeted for each action.

- 1. Choose the remaining vendors.** You can book entertainers, florists, and photographers a little later than other vendors. And since each vendor's pricing will vary, you can reassess your event budget for these suppliers after you've already prioritized your other main vendors.
- 2. Confirm speakers and gather biographies.** Confirm all your event speakers or special guests. And be sure to get any details you'll need for your programs as you begin to promote your featured names.
- 3. Make a supplies list and place orders.** The supplies you order might be determined by how much of your budget is leftover from the bigger purchases. If you don't quite have as much cash as you need, you still have time to fundraise or move things around.
- 4. Create emergency plans.** Safety is a top concern for all events. Find out about the venue's safety protocols and evacuation plans. Filling in the gaps with missing details can be time-consuming, which is why this should be completed well in advance.

## 1 – 3 months out

Without your event planning timeline, you'd be feeling a lot of pressure at this point. But with a schedule, you'll feel confident about putting the final puzzle pieces in place. There are just a few more tasks to take care of:

- 1. Send invitations.** Depending on the type of event you're planning, it's time to send invitations. Whether it's via snail mail or digital messaging, sending invitations now gives attendees plenty of time to prepare their own travel, work schedule, and accommodations.
- 2. Confirm vendor orders.** Check in with caterers and other vendors to make sure they received your order and can still deliver on all your requests. If you receive RSVPs beforehand, you can then give your vendors an updated headcount.
- 3. Discuss the venue's timelines with vendors.** It's important to discuss set up and take down with every member of the team. If someone needs to get in earlier than everyone else, you can check with the venue ahead of time to see if it's possible.