Event planning checklist

1. **Event planning and conceptualisation**
   - ☐ Define event objectives and goals
   - ☐ Select a suitable date and backup dates
   - ☐ Create a detailed budget plan
   - ☐ Choose an event theme/style and format
   - ☐ Draft an initial project timeline

2. **Supplier/speaker coordination**
   - ☐ Identify and contract caterers, event production and other suppliers
   - ☐ Confirm menu details and dietary requirements with the caterers
   - ☐ Book/reserve speakers as applicable, check re in-person or remote
   - ☐ Organise event photographer

3. **Venue selection and management**
   - ☐ Research and shortlist potential venues
   - ☐ Visit shortlisted venues and check for suitability
   - ☐ Check access, set-up and breakdown time with all suppliers
   - ☐ Check internet connectivity, use of projector/screens, chairs/tables
   - ☐ Confirm availability with all and book the venue
   - ☐ Arrange necessary permits and insurance for the event
   - ☐ Plan the layout, including stage, seating, reception, networking

4. **Marketing and communications**
   - ☐ Develop an event marketing plan
   - ☐ Design and distribute event invitations (digital or physical)
   - ☐ Utilise social media and email marketing for promotion
   - ☐ Prepare event signage and other display materials

5. **Registration and attendee management**
   - ☐ Set up an online registration system (noting who is attending/watching online)
   - ☐ Keep track of RSVPs and special requests
   - ☐ Send travel/parking information and event timings to all attendees
   - ☐ Prepare name tags and event materials for attendees

6. **Speaker management**
   - ☐ Confirm speakers' availability and provide timings and other details
   - ☐ Ensure any remote speakers have relevant instructions/have tested their setup
   - ☐ Request presentations with submission deadline
   - ☐ Arrange pre-event meetings/rehearsals/run throughs as required
   - ☐ Consider backup speakers/alternative schedule

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7. **Health, safety, and compliance**
   - ☐ Conduct HSE risk assessment
   - ☐ Ensure accessibility for all attendees
   - ☐ Plan for first aid and emergency procedures
   - ☐ Check compliance with UK laws regarding alcohol, noise, etc
   - ☐ Request RAMS from third party suppliers

8. **Pre event tasks**
   - ☐ Set-up online event link and share with remote attendees
   - ☐ Send online presenter calendar invitations/link for remote presenters
   - ☐ Finalise detailed event schedule (rundown) and share with production team
   - ☐ Confirm roles and responsibilities with your event team
   - ☐ Coordinate suppliers setup and breakdown schedules
   - ☐ Check final numbers for catering/badges
   - ☐ Brief event photographer and social media manager
   - ☐ Assign stage manager and confirm responsibilities
   - ☐ Request media release forms for all presenters (including you/your staff)

9. **On the day (or day before)**
   - ☐ Confirm roles and responsibilities with your event team
   - ☐ Set up a registration or welcome desk
   - ☐ Put up signage for toilets, cloakroom, event rooms, Wi-Fi etc
   - ☐ Display legal notices re broadcast/recording/photography
   - ☐ Share/display links/QR codes for event engagement tools
   - ☐ Organise and train microphone runners
   - ☐ Agree who will manage online comments/questions/issues
   - ☐ Meet with event host/s and discuss 'what if' scenarios
   - ☐ Test all AV equipment
   - ☐ Brief all presenters on AV, schedules and other essential information
   - ☐ Prepare any handouts, gift bags etc
   - ☐ Update all parties with any last-minute changes

10. **Feedback and follow-up**
    - ☐ Distribute post-event surveys to attendees
    - ☐ Debrief with your team to discuss what worked and what didn't
    - ☐ Thank attendees, sponsors, suppliers and speakers
    - ☐ Review final budget and calculate return on investment (ROI)

11. **Documentation and reporting**
    - ☐ Gather and organize event photographs and videos
    - ☐ Prepare a post-event report highlighting successes and areas for improvement
    - ☐ Share key outcomes and media with stakeholders and on social media

Online events & conferences * Live streaming * Video production * Animation

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