

*easyeventideas.com*

# Event Planning

GUIDE

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

## 3-4 Months Before

### SET GOALS

What do you hope to achieve with this event?

-----

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### SET BUDGET

- Estimated Total Budget \$ \_\_\_\_\_
- Place Vendor Estimates into Budget
- Budget Placed into Line Items
- Get Budget Approved

### PICK A VENUE

- Estimated Attendance \_\_\_\_\_
- Set Venue Budget \$ \_\_\_\_\_
- Determine Venue Requirements
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
- Check Venue Reviews
- Create an RFP (if you are Using an Outside Venue) and Send it to your Top Three Venue Choices.
- Select a Venue

### LOOK FOR VENDORS

- Identify your Needs (i.e. Food, Entertainment, Decorations, Tents, Tables, Chairs, etc.)
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
- Create an RFP (if you are Using an Outside Venue) and Send it to your Top Three Venue Choices.
- Select Vendors

### OTHER

- Create a Schedule for Yourself of Payment Due Dates and any Other Important Dates
- Begin to Create a Guest List or Marketing Plan

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

## 2-3 Months Before

### GIVEAWAYS

- Give Away Budget: \$ \_\_\_\_\_
- Brainstorm Giveaways
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
- Select and Order

### MARKETING

- Determine if you will be Using Invitations*
  - Set Invitations Budget
  - Create Invitation for Online or Print
  - Approve Final Invitation List
  - Obtain Contact Information for all of your Guests
  - Send Invitations
- Determine if you will be using General Marketing Campaign*
  - Create a Marketing Plan
  - Create or have Marketing Materials Created for you
  - Order your Marketing Materials
  - Send out Press Releases and Materials to Appropriate Venues
  - Update Websites and Social Media Accounts
  - Work your Marketing Campaign to get the word out

### CREATE A MASTER PLAN

- Gather all Important Contact Information from Vendors
- Confirm all Logistical Aspects
- Design the Venue Setup Plan
- Determine any Additional Activities
  - Taking Place During your Event
- Make sure all Vendors have Appropriate Insurance and Apply for any Permits Needed
- Create Registration System if Needed
- Create a Process for Managing Staff and Volunteers if Needed

### OTHER

- Make all Offers to Vendors/Artists/Venues and Sign Contracts
- Review Menu with Stakeholders

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

## 4-8 Weeks Before

### SIGNAGE

- Determine Necessary Signage
- \_\_\_\_\_
- \_\_\_\_\_
- Design and Order Signage

### MARKETING

- If Using Invitations*
- Send RSVP Reminder
- If you are Pre-Printing  
Name Tags Purchase  
Supplies
- If Using a General Marketing  
Campaign*
- Continue to Work within  
your  
Marketing Plan
- Hand out Marketing  
Materials
- Continue to Update  
Websites and Social Media  
Accounts
- Begin to Work on any  
Press/Photography Requests

### STAFFING NEEDS

- Determine Number of Staff  
Required: \_\_\_\_\_
- Send Email to Recruit Staff
- Recruit Volunteers
- Promote Volunteer Giveaways
- Determine Staff/Volunteer  
Schedule

### OTHER

- Make sure all Contracts are Submitted and Signed
- Review Details of Event with Stakeholders
- Determine Decor for Event and Begin to Purchase

## 2-4 Weeks Before

- |  |  |
|--|--|
| <input type="checkbox"/> Finalize Menu                 | <input type="checkbox"/> Finalize and Train Event Staff  |
| <input type="checkbox"/> Prepare Name Tags and Signage | <input type="checkbox"/> Confirm all Vendors   |
| <input type="checkbox"/> Finalize Guest Count          | <input type="checkbox"/> Finalize any Unresolved Contracts &<br>Process Checks to Deliver Day of Event |
| <input type="checkbox"/> Send Another Reminder         |  |

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

## 1 Week Before

- |  |   |
|--|---|
| <input type="checkbox"/> Send out Reminders to Attendees                           | <input type="checkbox"/> Procure Checks for Vendors   |
| <input type="checkbox"/> Create Day of Schedule and Distribute to Stake Holders    | <input type="checkbox"/> Confirm any Unresolved Item  |
| <input type="checkbox"/> Send out Staffing Schedule to Staff and Volunteers        | <input type="checkbox"/> Advance the Event with any Artist                                  |
| <input type="checkbox"/> CONTINUE TO PROMOTE PROMOTE PROMOTE                       | <input type="checkbox"/> Create your Event Assessment                                       |
| <input type="checkbox"/> Shop for any Last Minute Items you may Need for the Event | <input type="checkbox"/> Continue to Update Website and Social Media                        |
| <input type="checkbox"/> Gather all of your Decorations                            | <input type="checkbox"/> Create Badges for Press, Volunteers, and Staff                     |
|  | <input type="checkbox"/> Print and Assemble Anything you are Giving to Guests i.e. Programs |

## Day Of Event

- |  |   |
|--|---|
| <input type="checkbox"/> Have Day Of Schedule to Hand out to Staff                                     | <input type="checkbox"/> Verify all Vendors are in Place                  |
| <input type="checkbox"/> Hold a Last Minute Meeting with your Staff to go Over Any Last Minute Details | <input type="checkbox"/> Overview Setup with Venue Management             |
| <input type="checkbox"/> Setup Signage   | <input type="checkbox"/> If Seated Dinner Place Seating Cards             |
| <input type="checkbox"/> Setup your Check-in Table   | <input type="checkbox"/> Place Programs at Check-in or on Seats           |
| <input type="checkbox"/> Demonstrate Check-in For Staff  | <input type="checkbox"/> Have Checks Ready for Vendors                    |
| <input type="checkbox"/> Setup Name Tags   | <input type="checkbox"/> Confirm any Transportation for Guests or Artists |
| <input type="checkbox"/> Walk Through Venue  | <input type="checkbox"/> Continue to Promote Throughout Event if Needed   |
| <input type="checkbox"/> Decorate and Set Up Venue   | <input type="checkbox"/> Hold a Sound Check                               |
| <input type="checkbox"/> Make sure all Electronic Equipment is Functional                              |   |

**OTHER**

- |  |
|--|
| <input type="checkbox"/> Have Plan Set in Case of Emergency or Back Up |
| <input type="checkbox"/> for Inclement Weather                         |
| <input type="checkbox"/> Prepare any Security Needs you may have       |
| <input type="checkbox"/> Be Prepared for any Guests with Disabilities  |

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

## After Event

### ANALYSIS

- Analyze Event Metrics
  - Total Registrations/Expected Attendance
  - Total Check-ins/Actual Attendance
  - Attendance Percentages
- Hold a Post Event Meeting
- Create a One Page Analysis of the Event Successes and Needed Improvements

### SURVEY

- Not all Events Require Surveys, your Family Members probably wont Expect one at a Baby Shower so use when Appropriate
- Hand Out Survey as Guest Leave
    - or Send it Electronically After the Event
  - Compile Responses and Analyze

### FOLLOW UP

- For Attendees and Dignitaries:
  - Send a Personalized Thank you
- Reconcile Invoices
- Make any Outstanding Payments
- Count, Record, and Deposit any Money made from Ticket Sales
- Reconcile Event Budget

### VENUE

- Make Sure the Area is Cleaned up Before Departure
- Check the Space for Lost Possessions
- Work with Venue to Ensure Everything is Handled before you Leave

WE HOPE YOU FOUND THIS INFORMATION  
HELPFUL FOR MORE GREAT TIPS GO TO  
EASYEVENTIDEAS.COM