

Event planning checklist

Event planning checklist

You want to create successful corporate events that will be talked about for years to come (for all the right reasons). But how can you make sure that poor planning doesn't let you down on the day?

While not an exhaustive catalogue of tasks, our handy checklist will help you to reach your event goals and achieve a truly positive experience.

In this guide	
✓	Planning the event
	Establish your event goals, choose a venue and set your agenda.
✓	Organising the event
	Finalise all the details and add some magic.
✓	Promoting the event
	Create and launch a winning publicity campaign.
✓	Hosting the event
	Entertain, inspire and inform.
✓	After the event
	Capitalise on your event presence, long after it is over.

1. Planning the event

Great events don't just happen. Instead, a lot of planning and creativity goes into that one special moment. And, while every event is different, there are some key things you should consider to ensure nothing falls through the cracks.

Define your audience

Recognising and understanding your target audience is essential when planning your events.

"To understand what your event needs, you first have to think carefully about who you are talking to and what you want them to take away from the event. The more you understand your audience, the more targeted you can be with your messaging and the more successful your event is likely to be".

Paul Ashford, Apex Events Director

Set out what you want to achieve

Whether you're organising a conference, award show, team building event, or roadshow you have to know what you want to achieve. Without establishing the purpose of your event, there's a real danger that any benefits will be short-term and easily lost. And without set objectives, it's impossible to measure whether or not an event is successful.

So, one of the very first things you should do is to establish tangible goals and objectives. Why are you organising this event? Once you understand this, you can ensure that every part of your event is optimised for success.

"Clear objectives and a properly executed strategy is vital when it comes to communicating effectively, and making your events run smoothly".

Peter Forse, Apex Director

Set your agenda

If you want people to attend your events, you have to give them something worth giving up their valuable time for. So, one of the first and most crucial tasks (and potentially one that will define the success of the event), is planning an interesting, engaging and above all relevant agenda. You need to find the right messages to attract and influence your audience.

Ultimately, it's about making sure you deliver those all-important communications in a way that informs, impresses, entertains, and motivates.

Find out more about agenda building with Apex.

<https://apex.co.uk/events/services/agenda-setting-and-event-content-strategy/>

Decide on the format for your event

Before you can go ahead and agree on a venue, it's vital that you agree how you will run your event to make sure the space you choose is suitable.

Most conferences still follow the traditional plenary + breakout sessions format. However, there are a number of event structures that might serve your audience better. These range from contemporary adaptations of tried and tested styles, to highly innovative and tailored formats that are designed for a specific audience or communications need.

For example, to create a buzz and get people interested in what you are doing, consider shaking things up with collaborative event formats.

Choose the right venue

"At Apex we spend a lot of time on creative suggestions for venue configurations and the way a venue can be dressed and modified to add innovation and buzz around an event."

Paul Ashford, Apex Events Director

Choosing the right venue is essential to the success of your events. Indeed, the choice of venue can make or break your event and can have serious financial implications if you get it wrong.

Here are just some of the things you must consider:

- **Does it suit your event?**

Booking the Ritz ballroom for an event at which you're going to announce a downturn in business, or an uninspiring town hall for your 'best sales team' awards is clearly off the mark. But it's more subtle than that. What's your brand image? What's the purpose of the event? And, how does the look and feel of the venue support these?

- **Can your delegates get there?**

Your event doesn't have to be on a junction of the M6, but look at airports, rail links and major roads.

• Is it useable?

Think about projection distances in the main meeting room, and the amount and location of breakout spaces. An event for 200 people, in a space on the 12th floor, where the lift only holds five people is going to really mess with your agenda timings.

Finding the right venue is a professional job and it can make all the difference between a highly successful event and decidedly average one.

Find out more about our venue search & location service

<https://apex.co.uk/events/services/venue-search-location/>

Choose a theme

Having a theme for your event helps to get people excited and makes it stand out. But be sure to choose something imaginative and inspiring.

“Our event organisers have built circus rings, entire fairgrounds, and ice rinks. And we’ve done this inside hotel, marquees, and hangars. We’ve even recreated the city of New York. We’ve taken delegates into space, to the casino, on a Beatles Magical Mystery tour, and on an ocean liner. All without leaving the earth or even the venue!”

Jodie Billington, Apex Project Manager

TOP TIP: To add additional wow-factor, consider using interactive technology to help bring your event experience to life. But, no matter how good it looks, your event is unlikely to benefit your business if it doesn’t act as a catalyst for conversations. As such, your event not only has to look good, it also needs to support your wider business objectives.

Checklist

THINGS TO CONSIDER

4-12 months before event

DONE

Allocate roles (who is going to be responsible for what?).	
Choose an event management partner (to take full responsibility over all event management or to work in partnership with your in-house team).	
Establish your budget.	
Source quotes and create a budget (e.g. venue hire, food & drink, equipment hire, speaker fees, travel, entertainment etc.). Note down everything your event needs. From venue, décor, food and drink and entertainment to AV, guest speakers and marketing. Once you are sure you have covered everything, start sourcing quotes to find out how much everything is going to cost and where savings – or indulgences – can be made.	
Set out what you want to achieve; be that raising brand awareness, networking, training employees, boosting staff morale or something completely different.	
Establish quantifiable metrics of success (KPIs) to make sure your event delivers what you need it to.	
Establish who your target attendees are. A properly defined audience is crucial to getting the right message, in front of the right person, in the right way.	
Agree your agenda.	
Decide on the format for your event.	

Put entertainment in place

The one thing guaranteed to make your event turn into a snooze-fest is boredom. So investing in suitable entertainment is a must.

Entertainers come in all shapes and sizes, and we have a list of them to match. From classical harpists, fire-eaters and after dinner speakers, to military bands, jazz trios, comedians and singing waiters we've got a portfolio of contacts that would be the envy of many a reality show judge.

Take advantage of sponsorship opportunities

There are a number of ways of attracting event sponsorship. And this includes selling everything from naming rights to exhibition space. What's more, this can generate valuable income to cover your event costs.

Find out more about our sponsorship management service.

<https://apex.co.uk/events/services/sponsorship-management/>

Put a disaster plan in place

Live events are 'predictably unpredictable.' Which in short, means that if it can go wrong, then at some point it probably will.

"We had just put the finishing touches to a major 400 delegate, three-day event in London. I was driving and heard about the 7/7 bombings on the radio. Our client quickly decided that the event had to be moved outside the M25 ring, and we had eight days to find an alternative venue, re-plan the whole event, and communicate the changes to the delegates. Fortunately, we had the experience, resource and capacity to meet the challenge and the event went ahead without a hitch."

Paul Ashford, Apex Events Director

All kinds of challenges, from minor niggles to full-blown disasters are lurking around the corner to trip up even the most seasoned event management professional. Few things are more cringe-worthy than a well-planned event that suddenly unravels in front of a venue full of delegates and VIPs.

To help you plan for the worst:

- Make a list of your day full of disasters, and think what you can do to make the chances of each one happening as small as it can be
- Have a plan in place to deal with the risks you've already identified and put contingencies in place
- Make sure you have a backup in case you fall ill, or need more support to get your event back on track if something beyond your control affects your planning.

"I got a frantic call from one of our corporate clients whose event started in two days. Their in-house print bureau had let them down, and they needed the contents of a 170-page folder printing from individual Word documents for each of their 345 delegates. Nearly 60,000 prints collated and bound in 48 hrs

My first reaction was to reassure my client and tell them not to worry. My second was to call one of our key suppliers. I have a great business relationship with them and we worked out how it could be done. Every delegate got their folder at registration, and my client got a good night's sleep".

Rachel Kearns, Apex Account Manager

Wow your guests

Music, video and light can create a real spectacle. You can even use cutting-edge technology such as augmented reality and holograms to add additional wow-factor and give your audience something to talk about.

Apex has extensive experience when it comes to large-scale productions for entertainment, major conferences, gala dinners and staff open days. Our production managers will coordinate your set, building, sound, lighting systems and special effects to create a visually spectacular show. And it goes without saying that we'll keep everything to time right up to the final curtain.

Find out more about our AV and production services.

<https://apex.co.uk/events/services/technical-and-av-production/>

Checklist

THINGS TO CONSIDER

DONE

3- 9 months before event

Develop event master plan (timings, responsibilities, etc.).	
Develop your agenda and content strategy.	
Identify and book speakers.	
Choose and book entertainment.	
Identify and confirm sponsors.	
Agree all arrangements with venue and other suppliers (timings, menus, setup etc.).	
Decide on AV requirements.	
Decide on registration costs (how much it will cost to attend the event) as well as any early-bird/group discounts.	

2-3 months before event

Finalise presentation/speech topics and inform speakers/hosts.	
Source bios and photos for all speakers and hosts.	
Confirm travel and accommodation requirements.	
Put all necessary insurances in place.	
Confirm all logistics planning with suppliers.	
Make sure any necessary permits are in place (licences, parking, etc.).	
Confirm all details with the venue (e.g. menu, AV, set-up, signage etc.).	
Review security needs/plan and make sure contingencies are in place.	
Agree on any welcome packs/collateral required.	

1-2 months before event

Request a copy of speeches from guest speakers/hosts.	
Produce welcome packs/collateral.	
Check dietary requirements of guests and VIPs and pass to caterers.	

Online registration

When it comes to creating show-stopping corporate events, getting people to RSVP “yes please!” can be a challenge. To make sure your software is working hard to deliver the attendee numbers you need, look at leading-edge event registration platforms which offer more than just the ability to sign-up for an event.

For example, people come to events to network. So, by using a system which shows potential attendees who else is going, they know they will be in good company. But a word of warning, in doing this you will have to make sure you don't fall foul of data protection regulations. You can't take matters into your own hands and publicise a list of guests. However, you can use an online networking tool to enable people to set up meetings in advance of your event. And of course, if people have meetings in their diary they are far more likely to show up.

“Cloud-based registration platforms are a compelling and cost-effective solution. You can use them on a pay-per delegate basis, and manage your budget with regular recurring payments. But to really make them work for you, consider putting them in the hands of an expert; so you benefit from the best quality software and an experienced pair of hands to take all those annoying niggles away.”

Rachel Kearns, Apex Account Manager

Social media

Social media offers a great way to build excitement around an event and shout about it when it is happening. Things like announcing each winner's name on Twitter during an award ceremony can help people to feel extra special while raising awareness of your brand.

Social media “stories” are also growing in popularity. Capturing the best moments from a day (and vanishing soon after), stories are a fun, bite-sized way to present video content. And encourage people to view them before they disappear.

You should also establish an event hashtag. Much more than a gimmick this will help your guests to connect, share information and promote your event on your behalf.

Checklist

THINGS TO CONSIDER

DONE

4- 6 months before event

Create a publicity plan setting out all tasks and who is responsible for what (e.g. PR, social media, emails, advertising, etc.).	
Brand your event.	
Design and build an event website.	
Create Facebook event page.	
Choose and set up an online registration platform.	
Request logos from corporate sponsors for online and printed materials.	
Create media packs.	
Design and produce invitations, tickets, etc.	
Create and start to share publicity content (e.g., press releases, advertisements, blogs, videos, etc.).	
Agree an event hashtag.	
Promote early-bird/group discounts.	

ADD ANY NOTES HERE:

Apex removes the hassle from event planning

When it comes to event planning, if you want to do everything yourself there's no shortage of advice and tools available to help you to do it. And if you have the time, and enthusiasm, you'll do a fine job. But as you can see, organising an event is a full-time responsibility (and we haven't even covered all the things you need to do to make it a success!).

However, if you get an experienced event planner to help, not only will they do all the legwork, but they will also have the best quality tools, the time, and the wisdom that comes with looking after spectacular events day in-day out.

This means they can respond to and solve any unexpected problems that might arise, and even give you advice on how to make your event stand out. So, you can relax and enjoy the results while maintaining the overall say in what the event looks like.

What's more, the right event management partner can help you to adopt a more strategic approach to your events – from shaping your agenda, to theming and staging, to finding the right messages. So, while you might think it's cheaper to do everything by yourself, expert support could prove invaluable; and generate that all-important ROI.

At Apex, we create and deliver objective focused corporate events that look fantastic. With 30 years' experience in this area, our philosophy is based on exceptional service, expertise and innovative solutions.

We know the journey towards a successful event is seldom straightforward, often stressful, and usually challenging. Our team of account managers, creative designers, organisers and project managers are there to support you and your team from the initial design and development phase to organisation, set-up, delivery, and beyond.

Contact us today on **+44 (0)1625 429370**

or email mail@apex.co.uk to find out more or for an exploratory conversation.