Event-ure Awaits

Your Journey to Successful Events Starts Here!
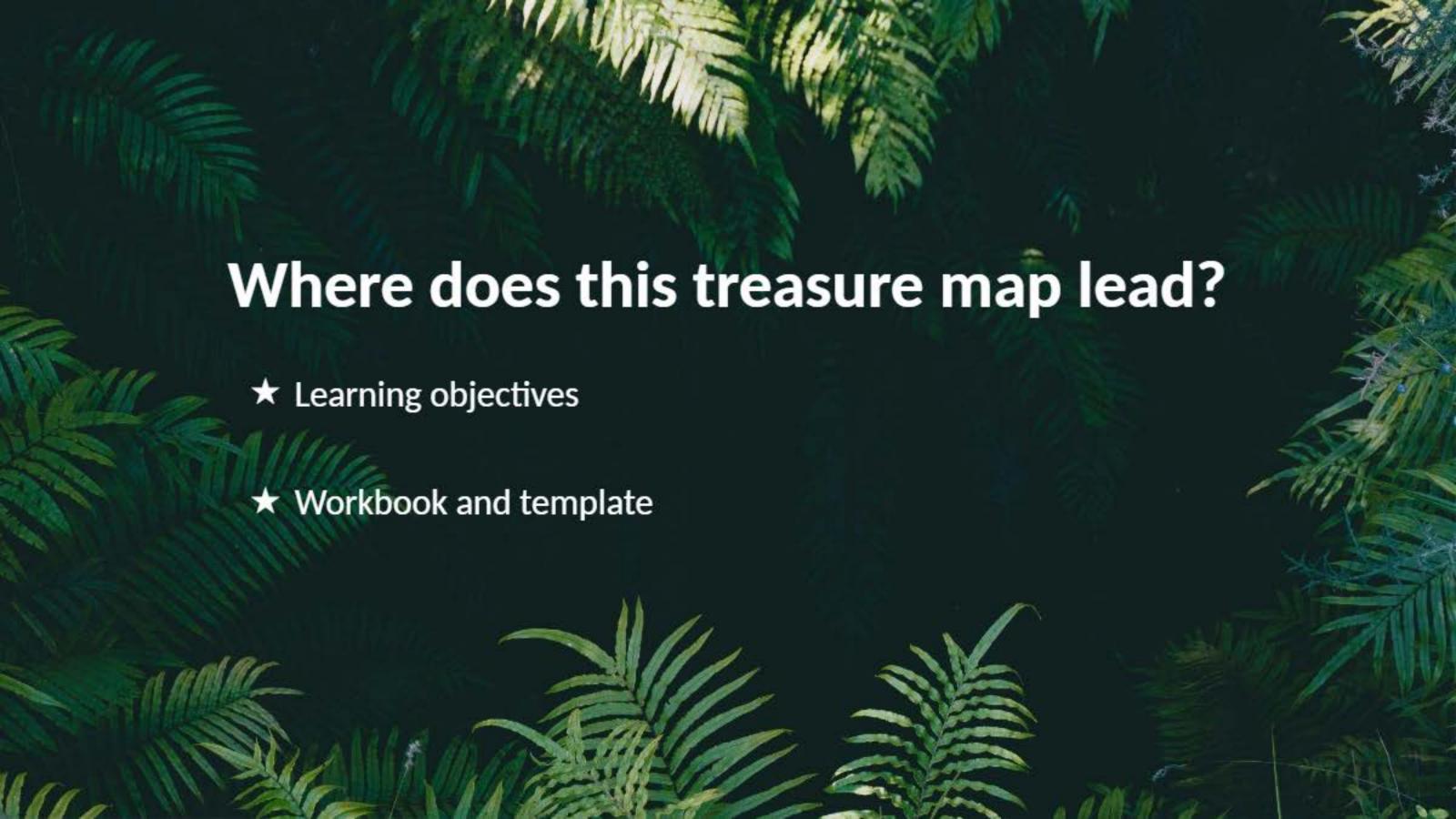
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Where does this treasure map lead?
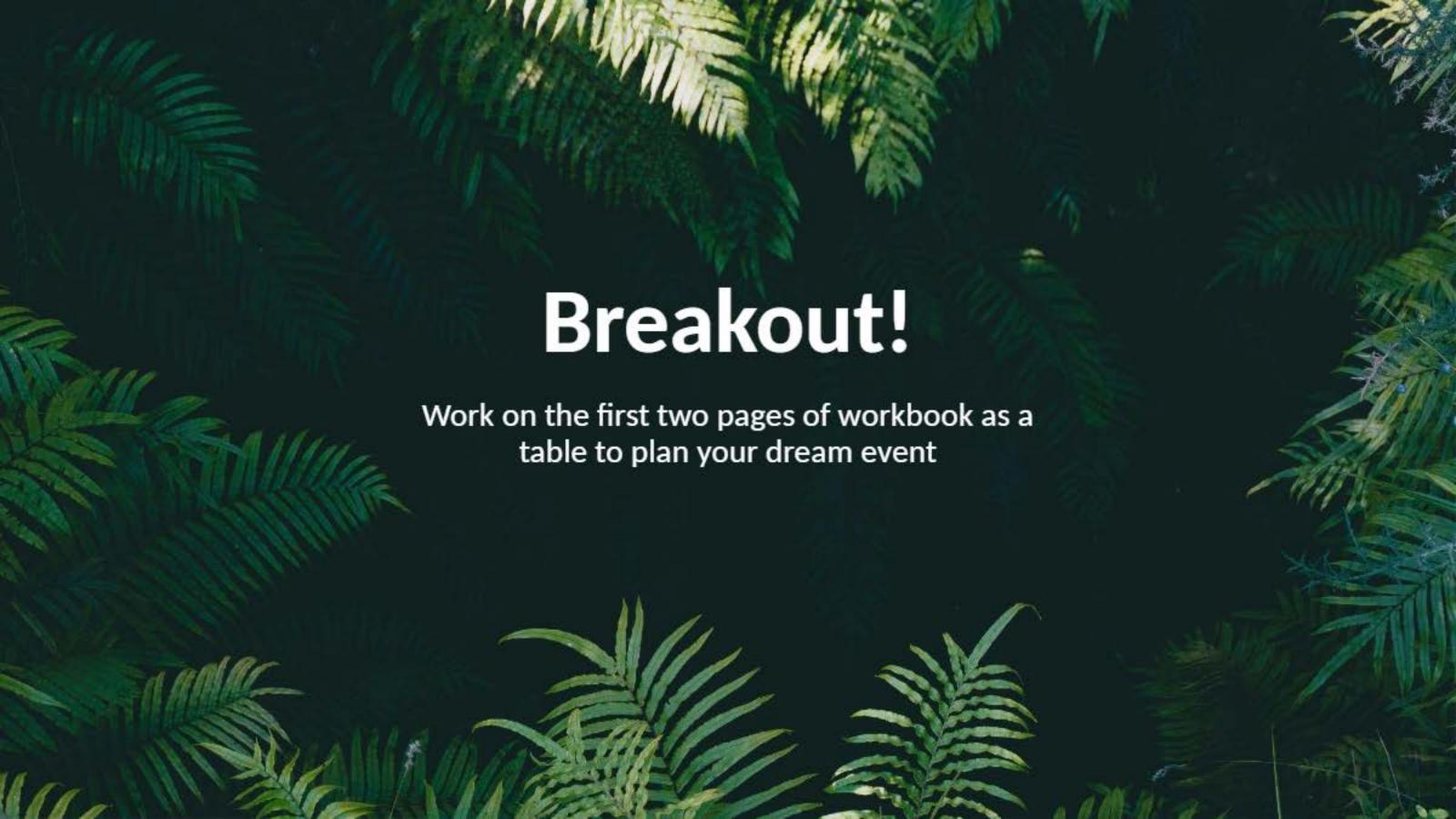
★ Learning objectives

★ Workbook and template

Event planning basics

* Why
  - Purpose of event
  - Influences everything else
* What
  - Happy hour, gala, reunion, etc
* Who (audience)
  - Who do you want to attend?
  - What type of event makes the most sense for them

* Who (partners/collaborators)
  - Who do you need to help execute this event?
  - Do you need volunteers?
* When
  - What time fits your event purpose and audience?
* Where
  - Align location with event type and audience
  - Consider key elements like accessibility and parking

Breakout!

Work on the first two pages of workbook as a table to plan your dream event

Event planning nitty-gritty

★ Contingency planning

★ Think ahead to avoid common problems
  ○ Technology
  ○ Weather
  ○ No-shows/walk-ins

★ Some things can't be planned for, be flexible!

"What If"

Think of challenges that occur during event execution and how to avoid or solve those issues

Problem	Solution
The microphone during your panel stops working.	Test microphone before hand. Ensure you have a backup.
A volunteer is not able to make it at the last minute.	Cross train volunteers so they can step into other roles. Check-in with volunteers a few days before event to remind them of event.
Weather changes and your outdoor venue is no longer viable.	Pre-plan an alternative indoor venue. Schedule a drop dead day/time for deciding if a venue change is needed. Be sure you have text or email info for attendee to notify them of change.

Event planning nitty-gritty

★ Marketing timeline

★ Marketing collateral

★ Multi-channel marketing

★ Market for your desired audience

★ Registration reminders

Marketing Checklist

Complete	Due date	Item	Notes
x		Create invite list	Segment audiences if needed
x		Create materials	Signs, invites, menu cards, etc.
x		Save the date	mail/email/text/social media
x		Order signage	
x		Order swag for attendees/speaker	
x		Registration	mail/email/text/social media
x		Registration 2	mail/email/text/social media
x		Registration 3 (deadline)	mail/email/text/social media
x		Day before reminder	mail/email/text/social media
x		Send post event evaluation	

Event planning nitty-gritty

★ Venue selection

★ Food/drinks

★ Showcase event theme in the decor

★ Everything costs something

Venue Checklist

Complete	Due date	Item	Notes
x		Research options and secure place	on-site/off-site/virtual
x		Determine menu and beverages	
x		Meet with event venue staff	Determine timeline, menu, space allocation
x		Venue layout	Plan where check-in, food, and seating go
x		Room decor	Linens, floral, lighting, etc
x		Audio/visual needs	Double check presentations/sound
x		Parking	Get permits/passes
x		Share final headcount to staff for food/bev	

Event planning nitty-gritty

★ Registration portal

★ Registration fee

★ Are walk-ins welcome?

Registration Checklist

Complete	Due date	Item	Notes
x		Determine registration deadline	
x		Determine registration fees	
x		Create registration form/site	Include any registration fees
x		Create registration confirmation	
x		Track registrations	
x		Make nametags for attendees	
x		Pack materials for check-in table	Pens, extra name tags, handouts

Event planning nitty-gritty

★ Determine if your event needs formal programming

★ Lock in your speakers early

★ Speaker details

★ Communication

Program Checklist

Complete	Due date	Item	Notes
x		Contact/confirm speakers	
x		Create schedule	
x		Register speakers for event	
x		Make speaker name tags	
x		Get swag for speaker	
x		Complete contacts if needed	

Event planning nitty-gritty

★ Responsibilities

★ Staff vs volunteers
   ○ Match people to their abilities

★ Check-in with your people leading up to event

Staffing Checklist

Complete	Due date	Item	Notes
x		Determine what responsibilities/roles need to be covered	Check-in, table hosts, coat check, etc
x		Create planning committee if needed	
x		Recruit volunteers	
x		Train volunteers	
x		Assign roles/responsibilities	

Event planning nitty-gritty

★ Create an event bag beforehand

★ Determine what needs to be set up

★ Check-in with venue staff

Day–of Checklist

Complete	Due date	Item	Notes
x		Gather "day of" items	Pens, name tags, swag, tape, scissors, signs, handouts, etc
x		Arrive at venue	
x		Hang signs	
x		Check-in with catering	
x		Check-in with venue manager	Check for last minute layout adjustments
x		Set up check-in table	

Event planning nitty-gritty

★ Gather feedback from everyone
  ○ Send post-event survey
  ○ Ask staff/volunteers

★ Event summary

★ Thank you cards and other housekeeping

Post-Event Checklist

Complete	Due date	Item	Notes
x		Attendee survey	
x		Speaker evaluation	
x		Cost analysis	Find net revenue and cost per participant
x		Event summary	Include evaluation responses, venue information, planning information, and potential changes for next time
x		Thank you notes	Hand written. Can be distributed at event or after

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Breakout!

Work through pages 7-14 as a table to continue to plan your dream event.

Thank you!

Please rate our session on the Whova app.

Contact us

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