

# EVENT Planning

The Essential  
Guide



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# The Big Event...

The best events appear to have come together effortlessly. But that “effortless” appearance takes a lot of work. If you’re ever feeling overwhelmed by a big event looming on your calendar, approaching the event with a set of very clear steps can be your answer. Here’s a check list to guide you through the process.

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

Type of Event: \_\_\_\_\_ Event Time: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

Budget:

## Six Months Prior

TASK	COMPLETED ON	COST	COMMENTS
a. Determine the purpose, format and target audience for the event			
b. Create a budget and get approval			
c. Select a date			
d. Select and reserve a venue (Disability needs?)			
e. Establish an event committee			
f. Reserve a block of hotel rooms if necessary			
g. Choose a caterer. Buffet or served? Liquor (cash bar or open)?			
h. Go to <b>ipgpromo.com</b> and order recognition/award items, tents, tablecloths, banners, etc.			
i. Reserve rental equipment including vans, buses, tables, chairs, tents, podiums, av equipment, etc.			
j. Confirm program speakers (if any)			
k. Plan presentations			
l. Plan promotion and publicity of event to internal and external audiences			

## Three Months Prior

TASK	COMPLETED ON	COST	COMMENTS
a. Determine type of invitation: e-mail, formal, informal			
b. Write copy and design invitation, (print if necessary)			
c. Contact mailing service if coordinating large quantity printed invitations			
d. Send "save the date" announcements to guests			
e. Determine estimated head count			
f. Contact program participants. Supply suggestions for their remarks, gather biographical information, request headshots for publicity			
g. Decide on music, book entertainment/ talent			
h. Plan for decorations, color scheme			
i. Go to <b>ipgpromo.com</b> to order branded merchandise			
j. Begin publicity			
k. Book a photographer for the event			
l. Begin creating a logistical outline to document all arrangements as they are decided on and confirmed			
m. Determine event staff. Staff registration? Parking? Security?			

## Two Months Prior

TASK	COMPLETED ON	COST	COMMENTS
a. Select menus and confirm contract with caterer			
b. Prepare mailing labels if sending formal invitations			
c. Send out invitations 4-6 weeks prior			
d. Finalize decor and facility arrangements			
e. Prepare, write and print (if necessary) the program			
f. Finalize audiovisual presentations			
g. Do a final walk through of the venue			
h. Disability needs?			
i. Determine signage needs ... produce.			

## Two-Four Weeks Prior

TASK	COMPLETED ON	COST	COMMENTS
a. Record RSVPs as they are received			
b. Send detailed instructions to all staff and participants			
c. Finalize details with caterer, rental company, etc.			
d. Do a diagram of the room/building to be used for seating charts if necessary			

## One Week Prior

TASK	COMPLETED ON	COST	COMMENTS
a. Create a "day of" schedule for the event planning committee including deliveries and event timing			
b. Print the guest list in alphabetical order			
c. Finish place cards, table cards and name tags			
d. Create a seating chart (if needed)			
e. Plan an information for all staff, greeters and volunteers			
f. Contact catering with RSVP count			
g. Prepare and "everything event box" with supplies such as tape, string, zip ties, staplers, clip boards, scissors, etc.			

## Day of the Event

TASK	COMPLETED ON	COST	COMMENTS
a. Arrive early			
b. Bring: logistical outline, production schedule, directions, phone numbers, food orders, seating charts, name tags, table assignments, guest lists, "everything event box"			
c. Check all facilities			
d. Set up event venue with tables, signs, awards, branded merchandise, etc.			
e. Conduct sound and computer checks			
f. Set up registration			
g. Enjoy the day!			

## After the event

TASK	COMPLETED ON	COST	COMMENTS
a. Finalize billing and prepare final budget			
b. Conduct follow up meeting to discuss ways to improve the event in the future			
c. Send thank you notes to volunteers and participants			
d. Survey attendees (if appropriate)			

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Comments and notes for next show: