



EVENT PLANNING CHECKLIST

THE PLANNING PHASE

DRAFT A BUDGET TO SUBMIT FOR APPROVAL. CONSIDER THE COST OF:

- Venue
- Catering
- Paid speakers
- Technical equipment
- An event website
- A dedicated mobile app for the event, from an
- expert event app creator like MobileUp
- promotional materials and ad spend
- Service fees & taxes

DETERMINE YOUR GOALS FOR THE EVENT:

- Define the event's objective. Articulate what you want the attendee to walk away with.
- Set specific targets and milestones in order to gauge its success, such as number of registrations, leads acquired, sponsor satisfaction, social media mentions, net promoter score etc.



EXPERT TIP: A mobile app created specifically for the event can be an excellent way to track goal performance, such as live event app polling and registration tracking through mobile check-in.



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SEARCH FOR SPONSORSHIPS:

- Identify potential sponsors.
- Draft different sponsorship tiers for them to choose from.
- Draft and send sponsorship proposals to pitch how it will benefit their company.

PROPOSE POTENTIAL EVENT DATES:

- Identify the ideal season.
- Determine the expected duration of the event. Days? Hours?
- Select a date that will give you at least 8-12 months to prepare.

RESEARCH IDEAL VENUES:

- Create a shortlist of contenders to compare the cost and features of each.
- Confirm the venues on your shortlist have availability on your selected date(s).
- Inquire about venue deposits and refundability.

CONSIDER EVENT MERCHANDISE:

- Decide what kind of promotional merchandise would resonate most with your specific audience.
- Compare costs from different vendors of promotional products.
- Find out how long shipping and manufacturing will take if a high quantity is needed.



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CONSIDER YOUR CATERING OPTIONS:

- Narrow the type of food you want to offer (cuisine origin, buffet style, served, grab-bags).
- Determine the amount of food/number of meals needed based on expected attendance.
- Create a shortlist of caterers that meet your food and budget parameters.

Ask if the caterer offers menu tastings and can accommodate dietary restrictions.

PLAN YOUR ENTERTAINMENT & SPEAKERS:

- Discuss what kind of talent or entertainment would be suitable for the event.
- Search speaker bureaus for speakers who align with the goals of the event and the organization.
- Reach out to agents and bureaus to begin assessing availability and speaker fees.



**PLANNING PHASE
COMPLETE!**



EVENT PLANNING CHECKLIST

THE PREPARATIONS PHASE

DETERMINE THE VENUE:

- Schedule a walkthrough at your top venues.
- Assess the venue's ease of access for attendees, especially for destination events.
- Once ready to sign, negotiate terms and conditions with your venue point of contact to ensure the best deal.

BOOK YOUR DESIRED SPEAKERS:

- Ask potential speakers to provide a highlight reel in order to gauge their stage presence.
- Enter into negotiations for speaker fees.
Discuss the content of speech and/or slides and how the approval process will work.
- Lock in your speaker as early as possible; many speakers book far in advance.
Book accommodations for your speaker, if necessary

ORDER MERCHANDISE & EVENT SUPPLIES:

- Order a sample of promotional materials from the vendor to assess quality.
- Submit full order once satisfied.



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THE PREPARATIONS PHASE

BOOK YOUR CATERER:

- Schedule tastings with multiple caterers.
- Lock your caterer in for the date(s) of your event.

CREATE A MOBILE APP FOR THE EVENT:

- Shop around for an app creator that specializes in conference and event apps to keep attendees engaged.
- Find out the timeline around app creation to ensure the developer has ample time to create a custom branded app for your event.

DRAFT A TENTATIVE SCHEDULE:

- Budget for attendee arrival, speaker slots, lunch, networking opportunities and happy hours, with room for breaks.

**PREPARATIONS
PHASE COMPLETE!**





EVENT PLANNING CHECKLIST

THE PROMOTIONAL PHASE

CREATE EVENT WEBSITE WITH ONLINE REGISTRATION SETUP:

- Launch a dedicated website for your event to link to in all paid ads and promotions.
- Set up an online registration portal through your site or a third party.

LAUNCH MARKETING CAMPAIGNS AND BUILD MARKETING COLLATERAL:

- Launch regular social media promotions for your target audience, including prospects and existing members.
- Design and print marketing materials such as brochures and programs.



EXPERT TIP: Include the download information for your app on all marketing materials to drive downloads.

- Determine the best outlets (across different mediums) for paid advertising in order to reach your target audience.



EXPERT TIP: Ask yourself: what does my ideal attendee read? Where do they shop? Where do they live? What do they watch, or listen to?

SEND EVENT REMINDERS:

- Launch email and social media campaigns to remind registrants of the upcoming event.
- Schedule reminder push notifications through the branded event app you've already created.

PROMOTIONAL PHASE COMPLETE!



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THE FINALIZATION PHASE

FINALIZE VENUE LAYOUT AND SET UP:

- Determine where signage will be posted throughout the venue so that attendees can easily navigate the event. This includes locating the restrooms and emergency exits.
- Ensure all supplies have been ordered for booths and decorations.
- Test equipment to make sure it is working properly, but be sure to test again on the day-of.
- Ensure all supplies, such as booths, graphics and banners have been shipped to the venue
- Contact hotel staff about potentially helping with set up prior to the event.

MAKE EVENT MATERIALS AVAILABLE ON YOUR EVENT MOBILE APP:

- Publish the event schedule, directions upon arrival, venue map, surveys and any other relevant documents for guests on your event app.
- Sync your registration list with your mobile app so all registrants are funnelled through your event app.
- Publish and promote event sponsors and speakers
- Generate and attach event surveys to collect actionable data for sponsors, speakers and future events.

CONFIRM PLANNED ACTIVITIES ARE IN ORDER:

- Touch base with your event staff, catering company, speakers and vendors to proactively address any snags in execution.

FINALIZATION PHASE
COMPLETE!



EVENT PLANNING CHECKLIST

THE POST-EVENT PHASE

MEASURE EVENT SUCCESS AGAINST PRE-ESTABLISHED GOALS:

- Follow up with attendees by sending emails, communications and event surveys if applicable.
- Use your event's mobile app to consolidate your data collection and engagement efforts.
- Activate push notifications through event app to remind attendees to review and submit surveys while the event subject matter is still fresh.

MANAGE FINANCES AND RECEIPTS:

- Compile all receipts from the entire event planning process and document them.
- Compare actual costs against the budget and make adjustments when planning future events and conferences



THE EVENT IS COMPLETE!

Having a branded mobile app condenses all of your event resources and communication efforts in one place, making sure your event runs as smoothly as possible. MobileUp is a leader in the creation of cost-effective conference and event mobile apps that enhance the guest experience. Alleviate the stress of event planning with MobileUp today.

SCHEDULE YOUR FREE DEMO AT [MOBILEUP.COM/REQUEST-DEMO](https://mobileup.com/request-demo)
OR CALL (913) 232-8099