Best Practices

- ❑ Don't reinvent the wheel – use past resources and contacts
- ❑ Spend most of your time in the planning stage
- ❑ Check in with your budget regularly throughout the event stages
- ❑ Create a filing system for events, venues/vendors and include notes for future events
- ❑ Make sure you choose the right tools for **you**, consider:
  - o Ease of use
  - o Capabilities
  - o Reporting types/formats
- ❑ Leverage templates:
  - o Sign-in sheets
  - o Name Badges
  - o Attendance statistics
  - o Budgeting
  - o Surveys
  - o Thank You letters
- ❑ Leverage venue/vendor relationships
  - o Understand your contracts
  - o Get it in writing
- ❑ Deliver items directly to the venue
- ❑ Manage changes and yourself
- ❑ Distinguish between must-haves/nice-to-haves/wish list
- ❑ Visualize the day
- ❑ Keep lines of communication open with supervisors, venues, vendors, speakers, attendees
- ❑ Ask for help!

Event Planning Timeline

(Based on a 90-day **planning** period)

Concept Stage - Day 1

Priorities	Goals and Objectives

Planning Stage - Days 2 to 30

Venue	Date/Time	Draft Agenda	Speaker Invites	Attendee List	Budget

Promotion & Registration - Days 31 to 88

Invitations	Communications Strategy

Execution - Days 60 to 89

Finalized Materials	Confirmed Details

Event Day - Day 90

Close-Out - Day 90 to 120

Evaluation Feedback	Thank You Letters/Gifts	Reports	De-Brief

Relax/Reflect & Onto the NEXT!

De-Compress	Continue to improve

Resources

(These are suggestions only – always run a test when using a new resource to ensure the resource meets your needs and the needs of your event)

Scheduling Tools
- Doodle
- Survey Monkey

Survey Tools
- Survey Monkey
- Fluid Survey
- Google Forms

Event Management Tools
- EventZilla
- EventBee
- TicketLeap
- EventBrite

Speaker Organizations
- National Speakers Bureau
- Speaker Spotlight
- Canadian Speakers Organization

For the list-makers –
"To Do" List Applications:
- Google Keep
- Wunderlist
- Todoist

Pre-Event Checklist

Concept Stage
- ❑ Priorities for planning
- ❑ Goals and Objectives for event
- ❑ Survey target audience
- ❑ Find past resources

Planning Stage
- ❑ Date
- ❑ Time
- ❑ Venue
- ❑ Speaker/Presenter List
- ❑ Speaker/Presenter Invite(s) sent
- ❑ Attendee List
- ❑ Budget – amount and required reporting
- ❑ Draft Agenda/Program
- ❑ Engage vendors
- ❑ Accreditation Requirements
- ❑ Schedule planning meetings

Promotion & Registration
- ❑ Select Event Management Tool
- ❑ Communications strategy
- ❑ Save the Date
- ❑ Invitations
  - o Initial Send
  - o Re-Send
  - o Reminders (2-3)
- ❑ Marketing pieces/graphics
- ❑ Social Media
- ❑ Website

Execution Checklist

Lead-up/Day-of Checklist
- ❑ Print Items
  - o Agenda
  - o Information Package
  - o Name Badges
  - o Directional signs
- ❑ PowerPoint Presentations
- ❑ Re-confirm with speakers
  - o A/V requirements
  - o Printing needs
- ❑ Speaker gifts
- ❑ Check in with venue
  - o Registration Table
  - o Signage
  - o Room set-up
  - o Catering
    - ▪ Numbers
    - ▪ Menu
  - o Special requests for:
    - ▪ Food
    - ▪ Accessibility
  - o A/V Requirements
    - ▪ Laptop
    - ▪ LCD Projector
    - ▪ LCD Screen
    - ▪ Podium
    - ▪ Microphones
- ❑ Check in with vendors on delivery status
- ❑ Annotated Agenda
  - o Circulate it
- ❑ Evaluation/Survey
- ❑ Check in with budget
- ❑ Day-of Assistance

Event Day Toolkit

- ❑ Pens and paper
- ❑ Registration Table Signage
- ❑ Directional signage
- ❑ Sign-in Sheet/Attendance Sheet
- ❑ Extra Name Tags/No Response Group
- ❑ Extra Flip-chart paper and markers
- ❑ Copies of the Annotated Agenda
- ❑ Extra copies of all print materials
- ❑ Extra USB key with presentations
- ❑ Venue and vendor contracts
- ❑ Contact Information for everyone

Post-Event Checklist

- ❑ Survey
  - o Initial Send
  - o Reminders (1-2)
- ❑ Thank You Letters/Gifts
- ❑ De-Brief
  - o Circulate Survey Results
  - o Meeting
- ❑ Reflect on how everything went for you and how you can continue to improve
- ❑ Make notes for next time and save them in your planning folder for next year!

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