

EXCLUSIVE

# Event PLANNING Checklist

- START TO FINISH GUIDE
- INSIDER TIPS FROM THE BEST
- WAYS TO THINK MORE CREATIVE
- SAVE MONEY WITH OUR TIPS



CREATED BY ENDLESS ENTERTAINMENT

# How To Use This Checklist



## Downloaded this Event Planning Checklist

Thank you so much for reading our exclusive Event Planning checklist. At [Endless Entertainment](#), we get asked for help planning events all the time, it's the nature of being in the events industry. We wanted to create this guide to share our tips and tricks that we picked up over the years of creating, managing, and aiding in events for 50 people all the way to 100,000. We created this guide for *you*.

When writing this guide, we wanted to give you as much information as possible to make you an effective and efficient planner. However, we realized we could have written a blog about each and every one of these tips. Instead, we wanted to give you the most concise list which gave you a starting point for planning your event, and not the encyclopedia. Maybe one day we'll write that.

We hope that, whether it's your first event or your 400th event, you will find value in these tips, insider tricks, and money savings shared with you in this checklist. It is our goal to make your life easier and, ultimately, that we will [create the equation](#) for you.

Thank you again for reading, and happy planning!



**Will Curran**

Co-author & President  
Endless Entertainment



**Alisha Rickman**

Co-author & Event Staff Manager  
Endless Entertainment

Event Planning Checklist Sponsored By Endless Entertainment

# Ideation

- Determine the purpose of your event** - Simon Sinek always [says start with why](#). Determine your events why? Why are you having it and why are people going to want to attend.
- Dream ideas** - Don't hesitate to dream big. Your planning stage is where anything is possible. Walk yourself through the big day and write down everything and anything you picture. Realize that some of these may not actually make it through to the day of the event but you never know!
- Market Research** - The most successful event planners will tell you that the best ideas are stolen, which also means you can learn from others on how to avoid the biggest mistakes. Research your event concept and see what is already out there. Did other events see a large attendance, was there a killer activity you can do a spin off of, what dates did they select for their audience, do they have any reviews that can give you a head start in avoiding mishaps?
- Target Attendees (age, likes, dislikes..etc.)** - It's important to determine who you want to attend your event right away since their lifestyles can effect the day and time. The more you can identify the person, the more you can cater the event to them.
- 3-5 Major Goals** - What do you hope to accomplish with your event? Outline these major goals and share them with your entire staff. Make sure to continually reflect on them to keep you on track by posting them somewhere visual like a bulletin board.

## Quick Tip

Tying in the community or a non-profit organization to your event purpose is a great way to give back and also tends to draw more exposure to your event, increasing attendance. A win-win for everyone.

# Possible Dates (Yes, Plural)

- Date/Times A, B, and C** - Have multiple event dates and times. It's important to have plan B and C just in case resources don't pan out the way you hoped would.
- Demographic** - It is essential to keep in mind your demographic. Is your demographic parents or their kids whose only availability fall between 6am and 9pm on weekdays? Are they young professionals who are open to a Thursday through Saturday conference rather than Friday through Sunday? If you are unsure, don't be afraid to survey the demographic to find the perfect time and day.
- Budget** - The weekdays save money, but less people might attend due to your target audience. Keep both of these in mind when determining the overall length of your event. Unfortunately, time is money.
- Avoid Double Booking** - Stay away from other conflicting events happening on your day. The best resource to use is your city's event calendar, where all major events will be covered.
- Weather** - Weather is very difficult to predict, but keep it apart of your date determining equation. Look at a weather almanac and the forecast periodically. Most importantly, ALWAYS have a weather plan back-up (even if indoors) because you don't want power outages, rain, or high winds to create potentially unsafe situations.
- Determine the Date** - With all things considered select A, B, or C to be the grand day.

## Quick Tip

At anytime in your event planning process, don't be afraid to go back to the drawing board. There is nothing worse then trying to stretch things to work then to put in a little more work to get the best outcome.

# Develop Event Concept

- Theme** - Every event needs a theme whether it's an old hollywood awards night or a technological revolutionary three-day conference. Our brain is designed to interrupt our environment with our 5 senses. If the sight, taste, smell, sound, and touch of your event triggers the same thing, your attendees are instantly transported to a different environment than the four walls of the venue. So ask yourself, where do you want to take them? How do you want them to feel?
- Create a vision board on Pinterest** - A vision board is a great way to give a visual representation to your dream for everyone to see. This will come in handy when handing off task to partners and vendors whether it's a graphic designer creating invitations or your production company designing the perfect audio visual set-up.
- Event Name** - Your event name is your best friend when it comes to marketing. It should intrigue people to dig deeper into the who, what, where, when and why. However, don't be so vague that someone couldn't get a glimpse of the event just from the headline.
- Expected Attendance** - Determine how many people you are looking to draw the event. Keep in mind any regulations that may be in place such as venue capacities. The more accurately you can estimate the attendance of your event, the better this will play into food, beverage, promotional items, and many other aspects of your event. Consider asking for an RSVP at catered events to ensure the right food and beverage quantities.

# Develop Event Budget

- Estimated vs. Actual** - You should always have two budgets when planning an event, an estimated breakdown of income vs. expense and an actual, the running total of what you have made vs. what you are spending. Do this even if you have a standard allocated budget by separating the money into categories of expenditure. Get as nitty gritty as possible because the more you narrow down your cost, the better you can budget and plan during the process.

## Quick Tip

Looking for help creating your budget document?

[Read Our Guide](#)

- Income** - List out all the ways you plan on having money come in. This can range from vendor booth fees, ticket sales, auctions, or merchandise sales. Be as realistic as possible because you rather fall over budget then under.
- Expenses** - Now list out all the possible expenses you might come across. Think of everything from rentals to even stamps for invitations. Create a cushion for yourself because things tend to cost twice as much as expected. When in doubt, double the expense.
- Emergency Fund** - Budget for murphy's law "what can go wrong, will go wrong". It is almost a guarantee that there will be last minute, unexpected costs so be proactive and give yourself a budget for this moment.
- Create A Project Timeline** - The biggest mistake you can make is holding off to the last minute. Late planning is one of the top reasons events never see their activation date. Take some time and really focus on when things should be completed and put harsh deadlines on them. Make sure items are going to the printer as soon as possible to leave time for quantity or quality mistakes.
- Give the Budget Your Attention** - Update the budget as you go even in the early stages of planning when you are receiving rough estimates and quotes.

# Make Your Partnerships

- **Consider Sponsorships** - The best way to look at sponsorships is creating partnerships with individuals or organizations who could equally benefit from your event. Be selective and ask for sponsorships from people who have the same purpose as you do. The ultimate trade off is that they can buy into the event to either sell or promote themselves (donation) or donate products/ services and let you do the promotion (In-Kind Donations).
- **Reach Out To Vendors** - Vendors are essentially your team, so pick them wisely just as you would sponsorships. They should align with your values. For example, if you believe in high customer service then so should they or you will not be satisfied. Pitch your event concept and possible dates to them, explaining why they are the perfect fit for the event. Once you pick your vendors, utilize their knowledge. Sometimes vendors can help you pick the right venue, set up, and entertainment eliminating a lot of the work from your plate. To get you started, ask yourself if you need help with:

## Quick Tip

You can find an agency who can do this all for you - one stop shop!

- Ticket sales & registration
- Event Management
- Audiovisual (For more information watch [How To Make Your Event AV Foolproof](#))
- Decor (tables, chairs, linens...etc.)
- Food & Beverage
- Parking
- Security
- Public Relations and Marketing
- Transportation
- Printing & graphic design
- Media (Photography & Videography)
- Government permits and extra resources (ie. police, street closures...etc.)
- Power (generator, light towers, distribution)
- Ecology (porter-potties, trash, recycling...etc.)

**Need a quote for event production?**

**Request A Quote**

# Make Your Partnerships

- Reach Out To Entertainment Options** - There is always going to be some kind of entertainment needed for an event whether it's speakers, musicians, emcees, or DJs. Don't wait to start the conversation with potential talent to get the event on their radar and get a glimpse of their availability. Also keep in mind that popular dates or last minute requests can become more expensive. Start by requesting talent fees and getting quotes as you would from any vendor. Again, it's better to book entertainment that can connect to your purpose and they might even lower the cost because of it. When you are ready to book your entertainment, here are a few things to keep in mind.
- Request Technical Riders** - Send them to your technical production company to get a rough cost. Be careful because sometimes these can be more costly than the actual talent fee.
- Request Hospitality Rider** - They are going to put one item on there that they are using to make sure you are reading it - ie. green M&Ms or a cardboard cut of our Alex Trebek with a mustache. They are expecting these requests to be so obviously stupid that you inquire about it. Most items are negotiable but be kind, if they request water, don't be stingy!
- Travel** - Consider travel and lodging costs of the talent (this is usually negotiable).
- Total Budget** - Add it up to get the real cost (talent fee, cost of technical rider, cost of travel & lodging and cost of the hospitality rider).
- Permits** - Secure permits if necessary (i.e. to serve alcohol).
- Total Budget** - Estimate total cost and income from your partnership and update your budget. Remember, you might have to go back to the drawing board and re-think your plans. Don't get discouraged if you do, this is just an opportunity for creative solutions.

# Venues & Site Surveys

- Dream List** - Create a dream list of venues from top picks to lowest picks and don't forget to include recommendations for vendor partnerships. Tackle the list contacting each venue asking for availability on your date preference and pricing information. This is also a great time to inquire about general regulations they may have about outside vendors. Cross off the venues that simply are not going to meet your needs and move onto the next step with the ones that are.

## Quick Tip

Being able to use outside vendors will save you money.

- Questions Are Your Best Friend** - The goals of site surveys are to get all your questions answered. Be prepared and have all of them written down ahead of time, especially any specifics your vendors might need to know. For example, your A/V team will need to know about power distribution, load in/out access, sound restrictions, parking, and many other details.

## Quick Tip

If you already know what vendors you will have, bring them along especially your audiovisual provider.

- Multi Event Venues** - Make sure you discuss if there will be other events going on at the same time as yours. This is very common in convention centers and you want to know how it will affect yours. Will it cause vendor arrival times to change due to loading dock availability? Will a competing company of yours be there at the same time?
- Parking** - Parking is your first impression to your attendees so make it as easy as possible for them. This is commonly overlooked and becomes a problem with limited spaces, price, and the ability to even find your event location. See if you can place directional signage or get parking validated to create ease for your attendees and vendors.
- Final Checks** - With all things considered, book the venue that fits your event needs the most. When doing so, make sure all your questions are answered and there are no grey areas. Review the entire contract and understand it fully before signing.
- Deposit** - Plan your deposits to avoid cash flow issues

# Initial Marketing

- **Save The Date** - Now that you have your who, what, where, when, and why, it's time to save the date and get the event on people's radar. This can be done via snail mail or email, both work wonderfully! But, be aware that attendees have a lot quicker of a response time to RSVPs if they are online. Even a pre-stamped envelope seems to be difficult to mail back!
- **Start Selling Tickets** - If you have an admission to your event, start selling tickets immediately. There are many ways to do this, but the most common are through email marketing (having someone RSVP/pay through a designated email) or through a custom made website.

**Quick Tip**  
Everyone likes to put things off until the last minute, so create hype for your event. Consider VIP experience limited tickets or give them to the first 100 that sign up. You can also discount your tickets for early birds and increase price as you get closer the event.
- **Market** - If marketing isn't your specialty, it can be beneficial to see if one of your current vendors can tackle spreading the word. Marketing trends change fast and change according to demographic, so it can be difficult to keep up-to-date when advertising your event. Social media, email campaigns, and guerrilla marketing are common ways and it's really valuable to put your event on all free public calendars through news stations and the community. This not only puts it out to the public, but lets other event planners be aware of the event to plan around. Attracting media through press releases is still a great way and remember to tie in a great cause to your event that is worth talking about.
- **Confirm Attendance** - Make sure to have someone who is responsible for handling RSVPs and confirming their attendance.

## Quick Tip

An event registration company or software can make this very easy.

# Gather Volunteers

- Create a “Benefits of Volunteer” Promotion** - Outline perks your volunteers will receive such as free tickets, VIP admission, drink or food tickets, t-shirts...etc.
- Collect Applications** - There are many websites designed to help you find volunteers for your event, but you should always create a landing page on your website for application submissions to promote and upload your brand/theme.
- Marketing Opportunity** - Push for those who have applied to volunteer to invite their friends. It’s great to have volunteers help promote your event through social media campaigns.
- Prepare Your Volunteers** - Make sure to meet for a training prior to the event and have a designated volunteer coordinator. On the day of, they should have a location to meet and have a coordinator direct them.

## Quick Tip

Consider name tags for your team so everyone is easily identifiable and using people’s name instead of “Hey, you!”. It’s also a great way to keep people coming back.

# Begin Your Timeline

- Your Initial Timeline** - This should include every detail you can possibly think of from when Suzie is picking up the balloons to when the entertainment is scheduled to perform. Whenever your first event tasks begin, start there. If those tasks start three days prior to the event date like making centerpieces or stuffing VIP bags with swag, right it on the timeline.
- Assign Duties** - For every task, make a column to list out what is needed for the task/general notes, schedule who is responsible, and their contact information for easy communication and in case anything goes wrong.
- Design a Layout Diagram** - Take your timeline and give it a visual representation. Draw out (to scale as much as possible) your venue space and what is going in it. Many of your vendors will be able to assist with this. Your venue contact may even have a layout to give you.
- Keep It Updated** - This will transform and become more solidified as you go through the process of booking talent and vendors. Keep it updated and pay close attention since this outline will help you prevent double booking, load in conflicts, and vendor needs that should be addressed as they arrive.

# Book Talent

- Riders** - Sign the riders and agreements with the talent you wish to have.
- Merchandising** - Discuss merchandise buy-outs and percentages of revenue share.
- Agreements** - All vendors and entertainment should sign an agreement to prevent no shows and unexpected costs. Make sure in your agreement to outline any of your standards which can exclude the extent they advertise at your event to what they wear.
- Travel** - If you're bringing talent in from out of town, book their flights and hotels now to save money.
- Marketing** - Give them your marketing information, so if you are having a public event, they can in turn market themselves at your event, increasing your reach.

# Book Vendors

**Avoid Conflicts Between Vendors** - Arrange for parking of all of your vendors and where they need to load in and out. Develop a schedule for when they will load in and out.

## **Décor**

- Connect your decor vendor to your venue and other vendors.
- Ask for a layout where everything is going and share that with your event team.
- Ask them to provide drawings and CAD designs when available for A/V and other vendors to match styles.

**Catering** - The caterer will tell you when they need your final numbers. Give yourself a cushion and order more than planned, but don't get carried away. You don't want to have to pay for a large amount of food from no shows.

- Ask your caterer what happens if there are leftovers, will they allow to-go boxes?
- Determine what happens if you under estimate and what alternative food choices they provide on the event date.
- Consider all possible dietary restrictions. Gluten free and vegan dishes are highly requested.

## **Media (photo and video)**

- Make sure your media crew has the schedule, so they know where to be at the right time.
- Provide on-site media with credentials to avoid security issues.
- Connect the video team to the audio visual team to assist with any needs.
- If you have press coming, give them a one-page brief about the event (press kit).

**Agreements** - All vendors and entertainment should sign an agreement to prevent no shows and unexpected costs. Make sure your agreement outlines your standards which can exclude the extent they advertise at your event to what they wear.

# Book Audiovisual

[Endless](#) is an event production company, so we decided to give you some insider tips on how to make planning your audiovisual easier! For tips like this, watch our webinar on [How To Avoid An AV Disaster](#) and [Top Tips For Hiring An Event AV Company](#).

- Connect them to your venue, entertainment, and décor
- Give them any talent riders and agreements
- Brief yourself on the technical terms you don't know (use Google), remember knowledge is power when talking to your A/V Company (for help, [download our production guide infographic](#))
- Ask for them to walk you through the quote line by line
- Make sure every detail is covered and then sign the quote(s)
- For a large event, request a Computer Assisted Design (CAD) so everything can be planned down to the detail and visualized
- Ask how much power they need
- Ask to be connected to the person who will be working the event on site. Having a person other than the techs running the lights and the sound, but works for your A/V company is important, this person will be able to be there at a moments notice when you need them. Want to know more? Read our blog on [The Importance of an Event Manager](#)
- Clarify meal and overtime policies to avoid unforeseen costs

# Begin Ordering The Mix

- Promotional Items** - Now that your vendors are booked and you are beginning to have a clearer outlook on attendance, it's time to book your promotional items if necessary. Keep in mind when deciding whether to include promotional items that the larger the order the lower the cost.

## Quick Tip

There are many great companies to order promotional items from, but make sure you order samples (with the printing on it) before purchasing. The quality and actual feel of items can come off looking cheap

- Signage** - Begin ordering any signage you may need for the event. This may be for parking, vendor booths, or actual programs for the event.

## Quick Tip

Keep all signage and parking themed with your event. Every little detail matters in the event planning realm.

- Send to Print** - Send any final items to print and make sure the designs are complete. Have you made your event feedback cards for vendors, volunteers, and attendees.
- T-Shirts** - Order any staff t-shirts if necessary. Order extra in each size just in case!

# Main Marketing

- Don't Reinvent The Wheel** - There are hundreds of articles on various marketing tactics online and offline; search and see what has been done before.
- Showcase & Hype** - Start showcasing what you are going to have at your event to get people excited. Social media and your website are the best places to do this.
- Influencers** - Find the influencers in your market and create blog posts and guest articles to be featured.
- Press & Media** - Contact media outlets to come to your event and cover it. Create a press release to deliver to the media who cannot attend. Ask them to write an article about leading up to the event. If you have community outreach, (i.e. non-profit) the media will want to be there.
- Social Media** - On-site encourage attendees to use social media like excessively, especially if your event is a multi-day event, this makes each attendee an evangelist to spread the word I can't figure out what this is supposed to say

# Two to Four Weeks Out

- Confirm Times** - Contact vendors and entertainment to confirm arrival times and see if there are any last minute questions, concerns, or needs such as an extra table for set up. It is very important to get this confirmation as vendors tend to be no shows.
- Assemble Event To-Go Boxes** - Have a designated box(es) to bring to the event where you start collecting items you may need to bring to the event. Include those miscellaneous items such as pens, clipboards, lined paper, quotes, badges, extra equipment, business cards, scissors, tape...etc. Also consider labeling your items you do not want to lose with a label maker.
- Request Payments** - Make sure all pre-event bills are paid. Take a look at your budget again to make sure you are in good standing the day of the event. Do you have to be cautious with expenses or push sales at the event? Maybe you need to push ticket sales through word of mouth or social media the last 4 weeks leading to the event.
- Command Center** - Give your team a space of their own. This should be where everything you might need is stored and where your team can sneak away to catch their breath or grab a bite to eat.
- Hand Out Information** - It's time to hand out all the information you can to your team. Does everyone have a diagram of the event set up, the event timeline with everyone's contact, social media guidelines, and any necessary vendor information they may need.
- Dress Code** - Communicate to your entire event team how they are expected to dress. Takes away the guessing game.
- Communication System** - Designate a way to communicate (walkie talkies with surveillance earpieces, comm system, text, call...etc). We recommend avoiding cell phone communication because it's slow and sometimes overwhelming. Look into a wireless comm system to be provided by your A/V company or a walkie talkie system for larger events.

# Day Of

- Have Fun** - Your day has come! Remember to step back and look at all you've accomplished and feel proud.
- Wear Comfortable Shoes** - You will obviously be on your feet the entire time.
- Media Contact** - If you intend to have media at your event, it is a good idea to have a media contact who can show them around the event.
- Who's Who** - You should have a representative for all partners so they clearly know who to contact and who is responsible for what.
- Know Your Team** - Meet everyone on your team from the A/V techs to the florists to the servers. This makes them feel human and if something goes wrong, you don't come off as pushy or mean because you can use their name.
- Take Breaks** - Sometimes it's easy to get in the zone, but take breaks and eat food.
- Check In** - Constantly check-in with your partnerships. This will help you be proactive if they are unhappy.
- Social Media Manager** - Have one person in charge of social media for the event. Make sure your hash tag is prominently displayed so everyone consistently uses it and have one person whose sole job is to take pictures, tweet, and monitor social media. Use tools like that allow you post to multiple platforms at once, as well as to monitor the use of your hash tag. Believe it or not, this is a full time job during an event.
- Collect Feedback From Attendees** - There are agencies that will do this for you with paper and text surveys. Consider reaching out to a local university to see if their special events class would like to take care surveys for you. Maybe have a permanent iPad installed with a digital survey for people to take. Give them an incentive to fill it out.
- Next Year's Date** - If you have the date for next year's event, announce it. This is your chance to hype up next year's event and convert current attendees into future attendees. Who are "all partners"?

# Follow-Up

- Immediately** - Send out a post-event feedback survey to attendees, vendors, and volunteers. Keep in mind, if you've already received feedback on-site you don't need to do this.
- As Soon As Possible** - Debrief with your entire staff - Share all the data and get all of the problems and successes out in the open to discuss.
- As Soon As Possible** - Write everything down so future staff can know exactly how last year went.
- As Soon As Possible** - Review your event goals - did you achieve them and if not document why.
- As Soon As Possible** - Review budget versus actual expenditures.
- Review Feedback** - Once all attendee feedback is received, review attendee feedback with your staff and add it to your debrief.
- Thank You Cards** - Send thank you cards to vendors, volunteers, media, partners and attendees immediately after your event.



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