



eventup
by tripleseat

Checklist for Your Next Corporate Event

When planning a corporate event there are many decisions to be made and items to keep track of - all while trying to stay on budget. Use this checklist to help you stay organized.

[Read the full blog here!](#)

6-12 MONTHS BEFORE EVENT

- Create An Event Budget
 - Include all costs such as venue, AV, travel, F&B, supplies, marketing, etc. and revenue from ticket sales, sponsorships, etc.
- Establish Revenue Stream Pricing (Ticket Sales/Sponsorships)
- Pick a Location & Contract an Event Venue
- Secure Hotel Room Block (if needed)

4-6 MONTHS BEFORE EVENT

- Create your event website and registration page
 - Include date, location, registration information, hotel information, agenda, speakers, sponsors, and contact information
- Start promoting your event & selling registrations
 - Create a spreadsheet to track sales each week
- Get a finalized event agenda (or finalize event structure and timing)
- Secure speakers and start coordinating their travel arrangements
- Start researching any outside vendors or service providers needed and get quotes

2-4 MONTHS BEFORE EVENT

- Finalize and book any outside vendors
- Create exhibitor kits for exhibitors/sponsors with deliverable deadlines
- Create a spreadsheet and track received exhibitor deliverables (logos, company descriptions, registrations, booth needs)
- Request rooming lists and pick up reports from the hotel to track room block pickup
- Determine attendee flow for venue and start thinking about signage needs, brandings

1-2 MONTHS BEFORE EVENT

- Finalize your staffing needs
- Send any staff and speaker reservations to the hotel
- Request a room audit from the hotel
 - This helps you keep track of any attrition
- Book travel (if any)
 - Flight pricing is typically lowest six weeks out
- Request and proof artwork needed for any signage, badges, onsite branding
- Put together an onsite program (if applicable)
- Put together final meeting specifications for BEOs and send to the hotel
 - Include final menu choices, audiovisual needs, room setups

1 MONTH BEFORE EVENT

- Send hotel confirmations to staff, speakers
- Request hotel to run a room audit against your attendee list before the cutoff date
 - Make sure you are getting credit for all rooms booked for your event
- Order any signage, branded items to be delivered to the venue
- Finalize details with vendors (if applicable)
- Build out mobile app and share with attendees Make available before the event if possible
- Create an onsite guide for staff (remember, they don't know as much about everything happening during the event like you do)
- Include responsibilities, timing, FAQ attendees might have

1 WEEK BEFORE EVENT

- Schedule internal pre-conference meetings with onsite staff and stakeholders
- Make sure everyone knows their roles, answer any questions, let them know where to meet and when
- Review BEOs, adjust any food and beverage numbers, list any dietary restrictions, make sure all information and timing is accurate
- Send attendees a pre-event email reminding them about the event
- Pack and ship event supplies
- Create a post-event evaluation
- Print badges (if not printing on demand or ordering)
- Make sure you have all phone numbers and contact information in one place for staff, vendors, hotel, etc.
- Send venue tracking information of all boxes being shipped

ONGOING

- Be mindful of upcoming deadlines (room block cutoff, final menu selections, early bird registration deadline, etc.)
- Communicate with the venue, vendors, internal stakeholders, exhibitors, and attendees
- Track and report metrics
 - Registration trends
 - Revenue (exhibitor/attendee)
 - App downloads
- Manage, update, and track budget

POST-EVENT

- Collect Feedback
- Collect post attendee survey data
- Collect feedback from internal stakeholders and event team
- Collect feedback from onsite staff
- Collect feedback from vendors
- Collect feedback from sponsors
- Schedule post mortem with the event team
- Discuss best practices, any issues that arose, things that worked well, and things that could use improvement
- Share post-event feedback collected
- Schedule post mortem with Venue (optional)
- Share resources with attendees
- Send post-event email with how to access presentations and other resources
- Include next year's dates if possible
- Update Event Website with next year's information
- Finalize Budget - Reconcile Event Financials
- Review final hotel bill for accuracy
- Review final invoices from vendors
- Make any outstanding final payments
- Record all final costs against estimated costs for budget
- Record any rebates/commissions from hotel against expenses
- Analyze Event Data
- The final number of registered attendees v. who attended the event
- Final room block pick up
- Final F&B numbers (did you need to order more food/ was there too much?)
- Number of app downloads/presentation downloads/ survey responses
- Make sure packages shipped from the venue make it back