
Corporate Events

— Your Planning Checklist —

8-12 Months



Establish Goals and Objectives

In this phase of the event planning process, you'll lay the foundation for success.

- What is your conference or corporate event's purpose?
- How many people do you want to attend in person or watch your livestream?
- If your event must turn a profit, how much do you want to make?
- How much will tickets cost?
- Where will your event take place?

Draft A Rough Budget

- Borrow similar figures from past events for a baseline
- Fill in the holes with educated guesses

Choose Format & Theme

- Brainstorm formats (tradeshow, conference, dinner) that will fit your goals
- Outline of who's attending your conference or corporate event and select a theme that resonates with your audience

Location, Venue, Vendors

- What geographic area is best for your event?
- How many people will be attending your event?
- Do you need to provide Wifi?
- Does the venue have the infrastructure you need?
- Are there local vendors you can rely on?

Select A Date

- Choose an optimal date and a second best for backup when getting sign-off

Research Speakers or Entertainment

- Research speakers who have spoken at similar events to yours
- Compile a list of your ideal speakers
- Determine your value proposition to potential speakers before reaching out
- Contact your ideal speakers and invite them

Search For Sponsors and Partners

- Determine what kind of activations you can offer
- Look at similar events to yours and see who sponsored them
- Compile a list of your ideal sponsors
- Segment attendees to understand their value to sponsors
- Determine the market rate of your sponsorship packages

3-4 Months



Finalize Speakers & Entertainment

- Sign your speakers, entertainment, and panelists
- Develop your agenda to keep attendees engaged
- Get bio information and photos
- Arrange travel and accommodations

Finalize Budget and Financials

- Choose your ticketing or registration technology
- Finalize sponsors and their contributions
- Set your ticket prices (VIP, early bird, and launch sales)

Build A Branded Webpage

- Craft copy and images that faithfully communicate the attendee experience
- Update your site (if recurring event) or build your new event's site
- Make sure your website infrastructure can handle the increased traffic during peak times
- Make sure your website is mobile-optimized
- Collect registrations online when possible

Promote Your Event

- Develop messaging and marketing pieces aligned with your event brand
- Spark early interest with email and social media content
- Reach new event-goers with paid advertising and event distribution
- Distribute your event on online event calendars
- Write blog posts about your event
- Create a promo video

Finalize The Venue Details

- Work with the caterer and sign the contract on the menu
- Secure A/V equipment and Wifi
- Review security needs and plans with your team and venue
- Make sure you have special permits, licenses, and insurance
- Determine event signage and attendee communication plan

Event Agenda

- Put together a working draft of your event's schedule

2 Months

Send Reminders

- Engage attendees on email and social media
- Reach out to speakers, panelists, and sponsors to make sure they're taken care of
- Contact vendors to confirm their commitments

Push Promotion and Marketing

- Rekindle interest with retargeting advertising
- Encourage last-minute buyers to register on email and social media

1 Week

Finalize Event Schedule

- Make sure everyone has the same schedule
- Get sign off on any speech scripts

Check Off All Final Details

- Update the caterer and venue with final registration numbers
- Confirm your schedule with vendors, including when to arrive and set up
- Double check the A/V equipment and WiFi

Merit Marketing Services

— Event Planning Checklist —

www.MeritMarketingServices.com

If you need assistance with event planning email:

Teri@Meritmarketingservices.com
