

Corporate Event Planning Checklist

This corporate event planning checklist makes planning any corporate event a little bit easier. Need one-on-one help? Contact an Aztec Event Specialist.

Event Building Blocks:

1. **Determine event goals and objectives.** This is very important with client events and sales meetings. It will really help you keep on track.
2. **Identify possible dates for the meeting.** No matter what date you pick someone will complain it doesn't work, but thinking ahead can limit the inconvenience for all parties.
3. **Prepare a preliminary agenda and guest list.** This will help you set the criteria for the venue.
4. **Send meeting requirements to selected sites with requests for written proposals.** If you are signing a contract you should always get a written proposal.
5. **Review site proposals from responding suppliers; select potential sites and begin site negotiations with potential venues.** Whenever possible speak to companies that have hosted similar events at the venue.
6. **Conduct site visits as required.** This is very important the first time you use a facility.
7. **Negotiate hotel rates and blocks.** If you use a hotel for the event, you should get a significant discount on rooms.
8. **Add any deadlines and other requirements to timetable.** Establishing these milestones for your event will keep you on track.

Event Strategizing:

1. **Form committees as required.** The larger the event the more work that is involved. Make your life easier by getting others involved. Organizations that have regular events should consider standing committees that meet as needed.
2. **Develop a promotional strategy.**
3. **Do some PR for the event.** Calendar notices, press releases, interviews may all be appropriate depending on the size of your event.
4. **If it is a non-profit or charity event, line up sponsors.** Prepare and mail letters to potential event sponsors requesting consideration in their budgets.
5. **Prepare preliminary budget categories and set preliminary budget.** Unless you manage your corporate event closely it is very easy to see budgets grow unexpectedly.
6. **Identify needs for outside consultants, and specify requirements.** Sometimes you need professional help. The better prepared you are when you interview a consultant the more likely you are to extra value.
7. **Hire a printer for all your collateral needs.** Invitations, thank-you cards, signage, etc...

Event Specifics:

1. **Establish meeting theme and preliminary graphics (logo, program, etc.).** Corporate events are great ways to enhance your corporate brand. Take advantage of the opportunity!
2. **If you are charging admission to the event establish registration-fee structures and policies, being certain to include clear cancellation policies.**
3. **Identify areas of need for outside suppliers; outline specific requirements, and select decorator, security, airline, car rental, audiovisual, entertainment, destination management, transportation, and registration services.** Obtain references from other companies in the area. Remember to check if they have adequate staff to handle your event and if they have insurance coverage.
4. **Know exactly how much you will be charged.** Understand the price structure, e.g. minimum hours for which you will be charged, charges for extra mileage, method for calculating mileage, and so on. Get everything in writing.
5. **Invite and confirm key speakers.** This includes people within your organization. Don't assume the VP of Marketing is automatically available.
6. **Determine preliminary food and beverage requirements and negotiate menus and prices.** Remember, it's all negotiable, but the more you customize the deal, the more you have to manage.
7. **Obtain audiovisual needs from speakers and presenters.** Order all necessary equipment as soon as you can.
8. **Review, update, and confirm final event budget.** An important step in keeping your costs under control.
9. **Prepare list of available hotel function areas and specifications.** Hotels can be very accommodating if you only ask.
10. **Incorporate topics and speakers into meeting format.** You should have an agenda for any event, even retirement parties and birthday lunches. Doesn't have to be formal but know who's doing the toast and who's serving the cake.
11. **Establish and implement credential process.** This includes preparing registration lists and preparing name badges.
12. **Identify and communicate on-site responsibility areas for committees and volunteers.** You have to keep these people happy if you want your guests to receive the best treatment possible. The key is training volunteers and educating them about your expectations.
13. **Select and order speaker gifts and any awards you may be handing out.**
14. **Order special decorations for your corporate event.** Sometimes for a small incremental charge you can personalize your décor with exceptional results.
15. **Determine security needs.**
16. **Prepare sign list; order signs.** Consider ordering special signage to build your brand.
17. **Arrange for all staff and VIP travel and housing.** We often get speakers together with key sponsors for a more relaxed networking session.

18. **Finalize food and beverage guarantees.** A common mistake is ordering too much of everything to "be safe."

Day of the Event:

1. **Have a staff/volunteer meeting to review responsibilities, procedures, and overlap areas like registration.** It will feel like you don't have time, but taking 10 minutes for an informational, and motivational, meeting will save you a lot of headaches later in the day.
2. **Confirm and monitor pickup of all rental equipment and supplies.** Sure, you ordered it, but did it really show up?
3. **Walk through the venue and run through your event planning checklist.**

Immediately After the Event:

1. **Pack and inventory all material.** Many of your collateral materials are reusable. It's a big investment, so take good care of it.
2. **Do financial reconciliation.** With a big event, you'll have many invoices and you need to make sure you have been billed correctly and you pay in a timely fashion. Watch expense reports, since a lot of cost can be hidden in those reports.
3. **Perform post-budget performance review.** Were you on budget? Could you have saved money?
4. **Prepare list for thank-you letters.** Prepare and mail letters.
5. **Collect and organize data for final meeting reports.** Obtain evaluations from staff, volunteers, and consultants. It is very important to evaluate what went right and what went not so right so the next time is easier.