

Event Planner Survival Guide

+ Event Planning Checklist



Preparing for a spectacular **year of events.**

Welcome to our Event Planner Survival Guide! As you gear up for an exciting new year of events, we're here to ensure you're well-prepared and equipped to tackle any challenge that comes your way. Whether you're a seasoned pro or a newbie to event planning, this guide is packed with strategies to help you succeed in the world of events. So, let's explore the ins and outs of planning an event!

1. Set Clear Goals

- ✓ Define SMART goals for your event.
 - Specific
 - Measurable
 - Attainable
 - Realistic
 - Time-based

2. Determine Your Budget

- ✓ Calculate your break-even cost to make sure all costs are covered.
- ✓ Put yourself in the shoes of your attendees – by knowing your value, you can optimize the tickets sold and profit made.

3. Embrace Technology

- ✓ Save time and stay stress free with [on-demand badge printing](#).
- ✓ Look for software that creates more face-to-face time with attendees.
- ✓ An event app will save you money on printed schedules and marketing materials.

4. Stay Organized

- ✓ Start by setting deadlines that you know you can hit.
- ✓ It's all about thinking ahead and finding ways to save time down the road.
- ✓ Using the same vendor leads to building solid work relationships.

5. Build Strong Relationships

- ✓ No matter how big the company, they're all human-led, so it's vital to know the personalities behind the business.
- ✓ Remember, the deal you're negotiating should benefit both parties.

6. Be Adaptable

- ✓ Anticipate challenges and create collaborative backup plans.
- ✓ Keep your team up to date with changes or any problems that pop up.
- ✓ When in doubt, ask for help.

7. Marketing and Promotion

- ✓ Create a consumer profile to highlight your audience's most common attributes.
- ✓ High-quality content is the secret ingredient to engaging with your followers and keeping them coming back for more.
- ✓ Email still reigns as one of the best ways to market!

8. Create Memorable Experiences

- ✓ Live performances boost event energy and maintain attendee engagement.
- ✓ Audition your potential acts before you book them.
- ✓ Choose a venue based on the number of attendees and space needed for entertainment.

9. Health and Wellness

- ✓ Physical activity is great for the body and mind, it can boost our problem-solving skills and ability to overcome challenges.
- ✓ Life is all about balance – and it's vital to get enough sleep!
- ✓ Food is fuel, friends.

10. Learn and Improve

- ✓ Comparing your goals to the outcome offers an immediate indicator of success.
- ✓ Be open to negative feedback. Think of it as an opportunity for growth in your events, planning practices, and as a way to get closer to your goals.
- ✓ Send surveys and feedback requests to sponsors, vendors, and the venue owners, too.
- ✓ No matter the KPI, you're looking for two things: signs of growth and how much.

Surviving the Chaos and Thriving in the World of Event Planning.

11. Crisis Management [🔗](#)

- ✓ Whoever will be affected by the back-up plan should know the back-up plan.
- ✓ Pre-draft emails for specific situations.
- ✓ Know your cancellation costs and whether or not you can reschedule.

12. Time Management [🔗](#)

- ✓ Prioritizing your workload starts by listing everything you need to do.
- ✓ For new tasks, estimate time needed by adding 20% to your initial estimate.
- ✓ Schedule the hardest projects at the beginning of the day.

13. Feedback Loop [🔗](#)

- ✓ Use an open-ended text box to gain general ideas or a list of concise multiple-choice questions for specific details.
- ✓ Brevity is key! Keep the survey short and to the point.
- ✓ Engage with your followers in a genuine way, foster a sense of connection so they can share their experiences.

14. Sustainability [🔗](#)

- ✓ Save energy by selecting a venue with existing energy-efficient features.
- ✓ Off-set your footprint with initiatives throughout the event or by giving back via donations, tree planting, or other environmentally positive actions.

15. Self-Care [🔗](#)

- ✓ The first step in beating burnout is to identify the source.
- ✓ Refuel: Do activities that recharge you creatively and emotionally.
- ✓ Talking to friends gives us a different perspective.

16. Networking [🔗](#)

- ✓ Half of the networking is giving your time away - set a time or day that you will reach out.
- ✓ Consider who will add a new point of view to something you are working on or help you gain insight.
- ✓ Connect with others via professional groups on LinkedIn and Facebook.

17. Team Building [🔗](#)

- ✓ Give your team the opportunity to learn more about each other.
- ✓ Take a moment to appreciate and cheer on each other's accomplishments!

18. Stay Inspired [🔗](#)

- ✓ Listen to industry podcasts, read books, and explore personal interests.
- ✓ Attend webinars and diverse events for continuous learning and inspiration.
- ✓ Inspiration is everywhere, just try to take it all in!

Congratulations, you're now well-equipped to dive into a new year of event planning with confidence! Remember, each event is a unique adventure, and the challenges you face only make the successes sweeter. To help you stay organized, we've included a handy event checklist. Here's to a fantastic year of events ahead!

Thank you.



Event Details

Event Name	_____	Date	_____
Main Contacts	_____	Venue	_____
	_____		_____



12-18 Months

Before the Event

Define Event Objectives

Create a detailed outline of the event goals and purpose.

Create Budget

Identify all potential expenses, including venue, food & beverage, speakers, marketing, and logistics.

Ticket-Pricing

Optimize ticket pricing by estimating costs, conducting a break-even analysis, and setting prices for profitability.

Select Event Date and Time

Consider holidays, industry events, and attendee availability.

Choose Venue

Research and visit potential venues based on capacity, location, and amenities.

Negotiate Contracts

Negotiate and finalize contracts with the venue, vendors, and any other service providers.

Develop Event Branding

Create a theme, logo, and other branding elements needed for the event.

Form Planning Team

Assemble a team with specific responsibilities and roles.

9-12 Months

Before the Event

Create Event Website:

Develop a dedicated website with event details, registration, and updates.

Select Keynote Speakers and Presenters:

Confirm speakers, discuss topics, and establish logistical details.

Create Marketing Plan:

Develop a comprehensive marketing strategy, including social media, email, and advertising.

Secure Sponsors:

Identify potential sponsors, prepare sponsorship packages, and secure commitments.

Plan Accommodations:

Arrange special rates with local hotels and provide accommodation information to attendees.



6-9 Months

Before the Event

Open Registration

Launch online registration and ticketing platforms.

Create Event Program

Outline the event schedule, including sessions, breaks, and special events.

Arrange Catering

Select catering options for meals, breaks, and special events.

Coordinate Logistics

Plan transportation, parking, and other logistical details.

Finalize Event Agenda

Confirm speakers, sessions, and any entertainment.

3-6 Months

Before the Event

Order Event Materials

Arrange for printing of programs, badges, signage, and promotional materials.

Select Onsite Event Check-In/Badge Technology

Finalize contract for event tech and equipment requirements.

Confirm Audio-Visual Needs

Verify AV requirements and equipment.

Coordinate Exhibitors

Reach out to exhibitors, confirm booth details, and coordinate logistics.

Plan Networking Activities

Organize networking events, receptions, and social activities.

Accessibility

Ensure venue and materials are disability-accessible, providing wheelchair access, sign language interpreters, and necessary accommodations.

Review Security and Safety Measures

Ensure proper security and emergency plans are in place.

1-3 Months

Before the Event

Finalize Attendee List

Confirm the number of attendees and finalize registration details.

Coordinate On-site Staff

Train event staff and volunteers on their roles and responsibilities.

Test Technology

Conduct technology tests for presentations, live streaming, and registration systems.

Finalize Seating and Room Setup

Confirm room layouts and seating arrangements.



1-2 Weeks Before the Event

Communicate Final Details

Send final instructions, schedules, and logistical information to attendees, speakers, and staff.

Check-In with Vendors

Confirm all arrangements with vendors and suppliers.

Prepare Event Team

Conduct a final briefing with the event team.



Event!

Post Event

Collect Feedback

Gather feedback (surveys, interviews) from attendees, sponsors, and speakers.

Evaluate Event Success

Review the event against initial objectives and budget.

Send Thank You Notes

Express gratitude to staff, sponsors, speakers, and volunteers.

Follow-Up Marketing

Keep the marketing momentum going! Use the lessons learned from this event to promote and elevate future events.

Don't forget, when organizing your event, there's no such thing as being overly prepared.
Happy Event Planning!

