

ULTIMATE EVENT PLANNING CHECKLIST

CORPORATE, TRADESHOW &
NETWORKING EVENTS



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Event Planning Checklist

From Idea to Post-Event Success

Creating a memorable event doesn't happen by chance. It starts with a clear plan, supported by actionable steps. Whether you're organizing a small gathering or a large-scale corporate event, this checklist will guide you from concept to execution and post-event follow-ups.

Start With a Solid Foundation

A successful event begins with alignment and strategy. Here's how to establish a strong foundation:

- **Develop personalized strategies:** Tailor solutions that meet your organization's unique needs and goals.
- **Define clear objectives:** Outline the "why" behind your event. For example, are you focused on lead generation, strengthening relationships, or brand awareness?
- **Identify your target audience:** Clearly understand their needs and how your event will provide solutions and resonate with them.
- **Set your budget:** Allocate resources wisely while accounting for both expected and potential hidden costs.
- **Choose a suitable date and time:** Ensure it aligns with your audience's availability.
- **Brainstorm potential venues:** Assess feasibility, accessibility, and alignment with your event theme.

Step 1: Define Your Event Goals

Your objectives will drive every decision and ensure your efforts are measurable. Start by asking:

- What do we aim to achieve? (e.g., capturing 200 qualified leads, hosting 15 client meetings)
- How does this event align with our broader business goals?

Example goals include:

- Collect contact details for 300 prospective clients.
- Establish authority by hosting a breakout session.
- Launch a new product and generate industry buzz.

Define the Goals – Sample AI Prompts

1. Prompt: *I'm planning a corporate in-person event to drive brand awareness among [insert audience]. Write a SMART goal for this event based on this objective. Make it measurable and time-bound.*
2. Prompt: *List 3 clear event objectives for a [insert industry] company running an in-person customer education workshop. Include goals related to engagement, attendance, and post-event actions.*

3. Prompt: *What KPIs should I track to measure the success of an in-person B2B event with the goal of generating sales pipeline? Provide at least 5 metrics with explanations.*
4. Prompt: *Generate 3 mission statement variations for a half-day in-person event focused on empowering small business owners to improve their digital marketing strategies.*

Step 2: Budget Wisely

Events can be expensive, and unexpected costs can quickly derail your plans. Create a clear, realistic budget with a 10–15% buffer for surprises.

Key Budget Categories to Consider:

- Venue and booth costs (including utilities and Wi-Fi)
- Custom booth design, signage, and materials
- Technology rentals for presentations and lead capture
- Marketing materials and giveaways
- Travel and accommodation for staff
- Staffing costs for onsite support

Step 3: Pre-Event Preparation

Meticulous preparation ensures your event runs smoothly and creates a seamless experience for attendees.

- **Research and finalize logistics:** Choose the best date, time, and venue for your audience and theme. Secure your booking and check off technical requirements.
- **Establish a timeline:** Build a checklist of key deadlines to keep your planning on track. (See [bonus timeline outline at bottom of this PDF](#)).
- **For sponsorships,** ensure a dynamic and compelling exhibit/booth.
 - **For Exhibit Sponsorship: Design an Eye-Catching Booth-** Your booth is often the first impression attendees will have of your brand. Ensure it communicates your company's value in an instant with professional, engaging visuals.
 - Booth Best Practices:
 - Use bold graphics and concise messaging. Your booth should tell your story at a glance.
 - Incorporate an interactive element, like hands-on product demos or touchscreens explaining your services.
 - Make it approachable. Avoid barriers like high tables that deter attendees from engaging.
 - Don't forget the details! Adequate lighting and comfortable seating can make your booth more inviting and approachable.
- **Curate compelling content:** Plan content that aligns with your objectives, including speakers, entertainment, and activities. Ensure all presentations and visuals are finalized well in advance.
- **Engage stakeholders early:** Confirm key executives, hosts, and speakers. Secure their calendars and provide detailed schedules.
- **Develop guest profiles:** Tailor experiences to match your audience's interests and expectations.

Amy's best practice:

- **Ensure Seamless Execution:** Conduct pre-event rehearsals, assign roles, and finalize all arrangements ahead of time.
- Run through all of the event workstreams daily to ensure there is nothing being missed.
- Ensure all booth content or demos being shown is packaged up and reviewed/ready at least 1 week prior to the event
- Conduct a know before you go for all employees staffing the booth and executives and speakers

- Ensure all important sessions, functions, meetings, are on all employee and executive calendars (in the event Time Zone with event/meeting details and location clearly marked).

Step 4: Promotion and Marketing

An exceptional event won't succeed without strategic promotion. Here's how to build buzz:

- **Open registrations early** with an easy-to-navigate system and automated confirmation emails.
- **Share teasers and sneak peeks**, such as behind-the-scenes details or exclusive content, to generate excitement.
- Use a **mix of marketing channels**, including email, social media, and partnerships.
- **Create personalized invites** and follow-up closely with key prospects.
- **Engage your audience** with creative content such as polls, countdowns, or Q&A sessions.

Drive Attendance Before the Event: A great booth is only useful if people show up. Use digital marketing tools to create buzz and ensure your target audience knows where to find you.

- Pre-Event Marketing Tactics:
 - Email Campaigns: Send invites to your client base and newsletter subscribers with details on your booth, session schedule, or exclusive demos.
 - Social Media: Share teaser posts and countdowns featuring event hashtags. This increases discoverability and excitement.
 - Event Partnerships: Collaborate with event organizers or other exhibitors to cross-promote.
 - Include actionable details like your booth number, presentation times, or incentives for stopping by (e.g., free samples, giveaways).

Step 5: Event Day Execution

Execution day is about precision, communication, and responsiveness. Use your checklist to manage time and troubleshoot fast.

- **Assemble** a dedicated team to manage on-site operations and problem-solving.
- **Conduct** a final run-through or rehearsal with your team and any speakers or performers to iron out last-minute details.
- **Double-check** all logistics, such as seating arrangements, audio-visual equipment, and catering (if applicable).
- **Set up** signage, branding, and materials at the event location or within virtual platforms.
- **Greet** attendees warmly and ensure check-in processes are seamless.
- **Monitor** the schedule closely and adapt to any unexpected changes.
- **Engage** actively with attendees through Q&A sessions, polls, or on-site networking opportunities.

Amy's best practice:

- Prepare a contingency plan to address potential issues, such as technical glitches or weather-related challenges.
- Assign clear roles and responsibilities to team members for smooth coordination during the event.
- Arrive early to set up and troubleshoot any technical or logistical issues.
- Have cell phone numbers for all event-related stakeholders + all speakers, hosts and executives. You may need to chase someone down!

Event Day Execution – Sample AI Prompts

1. Prompt: *Create a detailed run-of-show schedule for a half-day in-person corporate event with 3 sessions and a networking break. Include timing, ownership, and transition points.*
2. Prompt: *Write a checklist for event staff working at a live executive breakfast event. Include roles like greeter, tech support, emcee, and session lead.*
3. Prompt: *Create a communications plan for day-of coordination. Include how and when I should brief vendors, speakers, and internal staff.*

Step 6: Post-Event Follow-Up

The work doesn't end when the event does. The post-event phase is where business relationships deepen and insights can fuel future success.

- Send personalized thank-you notes to all attendees, speakers, and sponsors.
- Share event highlights such as photos, presentation slides, or recorded sessions.
- Launch a feedback survey to assess attendee satisfaction and measure event impact.
- Analyze metrics (e.g., attendance, engagement rates) to determine ROI.
- Reflect on lessons learned and document actionable insights for next time.

Post-Event Follow-Up – Sample AI Prompts

1. Prompt: *Write a professional follow-up email to attendees of a B2B in-person event. Thank them, share key takeaways, and invite them to book a follow-up meeting or explore related resources.*
2. Prompt: *Generate a 5-question post-event survey to collect feedback from attendees about content quality, logistics, and satisfaction.*
3. Prompt: *Create a short event recap email that highlights what happened and provides links to session recordings, slides, or the next steps.*

Avoiding Common Event Planning Mistakes

While a well-planned corporate event can deliver outstanding results, there are some common pitfalls that could diminish its impact. Recognizing these challenges ahead of time can empower you to create an event that stands out.

- **Skipping Clear Objectives** - Without clearly defined goals, it becomes difficult to measure the success of your event or align your team around shared outcomes. Before planning logistics, identify your key objectives—whether it's increasing brand awareness, generating leads, or building customer relationships.
- **Underestimating Budgets:** One of the most frequent issues is overlooking hidden costs, like last-minute vendor charges, Wi-Fi at venues, or setup fees. Always build a buffer into your budget to avoid surprises.
- **Not preparing speakers adequately** ensure every speaker knows where they need to be and when. Ensure you have their mobile + any content or notes they need for presenting as backup.
- **Not preparing booth or event staff properly** with a detailed pre-show meeting (a know before you go)
- **Neglecting Audience Engagement:** A great event isn't just about the content—it's about connection. Missing opportunities to engage your audience, both before and during the event, can limit its reach. Incorporate activities like live polls, Q&A sessions, or networking opportunities to keep attendees involved.
- **Poor Marketing and Promotion:** Even the most well-thought-out event won't succeed if no one knows about it. Be strategic in your approach to promotion, leveraging email campaigns, social media, and partnerships to generate buzz and attract attendees.
- **Lack of Post-Event Follow-Up:** Many planners focus so much on execution that they forget the event's real value comes after it ends. Failing to follow up with attendees—whether through thank-you emails,

surveys, or sharing key highlights—can mean missed chances to cultivate relationships or gather insights.

By avoiding these common mistakes, you'll position your event for success and ensure your team delivers an experience that achieves your goals while leaving a lasting impression.

BONUS TIMELINE OUTLINE (T-framework)

Create a Detailed Timeline Once your event date is locked, work backward to craft a week-by-week timeline. This will keep everything on track and prevent unnecessary chaos as the event approaches.

3-6 Months Before the Event:

- Finalize event goals and budget.
- Register for the event and secure your booth location.
- Brainstorm initial creative concepts for the booth or exhibit.
- Identify team members who will attend or assist.

2 Months Before the Event:

- Finalize booth design and materials.
- Confirm hotel bookings and travel arrangements.
- Plan pre-event promotions to announce your attendance (social media posts, email campaigns).

1 Month Before the Event:

- Train your on-site team (talking points, lead capture tools).
- Confirm shipping logistics for all booth materials.
- Revisit your checklist to ensure nothing has been overlooked.

1 Week Before the Event:

- Pack all essentials, including backups (power strips, business cards, etc.)
- Confirm delivery of booth items to the venue.
- Test lead capture devices and ensure they sync with your CRM.

Stick to your timeline to eliminate last-minute stress and ensure you show up ready to perform.