

Generic Event Planning Checklist

Once You Set A Date You Can:

- Determine time
- Determine and book location (get confirmation or contract)
- Determine event concept, theme, etc.
- Establish a budget
- Send a save the date announcement
- List your event with Orgs@SMU
- Outline logistics: rentals, furniture, parking, security, housekeeping
- Put on VIP calendars: University officials, other organizations, office calendar, etc.

2 or More Months Out:

- Set menu, decorations, musicians and A/V needs – book all vendors and services
- Performer needs: microphone, podium, stage, props
- Design invitations or announcement
- Determine your advertising/marketing plan, including social media
- Invitation list
- Ticket sales process or RSVP database
- Directional signage
- Draft a production schedule
- Write scripts; include introductions of VIPs
- Establish a publicity game plan
- Decorations/theme development
- Entertainment
- Rain plan
- Sponsorship
- Ticketing/registration
- Track expenses and update budget

Four Weeks Out:

- Photographer
- Mail invitations
- Track ticket sales/RSVPs
- Walk through every step of the event including the venue

Three Weeks Out:

- Schedule briefings with VIPs
- Call all vendors to confirm
- Solicit volunteers
- Walk through every step of the event

One Week Out:

- Finalize production schedule. Include all telephone numbers
- Finalize scripts
- Create and distribute staff/volunteer assignments
- Walk through every step of the event

Three Days Out:

- Give caterer final guarantee. Confirm delivery and set-up times
- Nametags and registration/check-in materials
- Head table/seat assignments
- Walk through every step of the event

Day Before:

- Prepare an event bin: nametags in alpha order, office supplies, blank nametags, production schedule, scripts, guest list, giveaways, and signage
- Reconfirm: Venue, catering, valet, musicians, florist, A/V
- Walk through every step of the event

Day of Event:

- Check venue: temperature, cleanliness, furniture arrangement, signage, restrooms, mic check
- Confirm arrival of flowers, musicians and photographer
- As unconfirmed guests arrive, make them a nametag and write their names on something to keep track.
- Check names of VIPs for script/introductions
- Get feedback

Day after Event:

- Use nametags to establish attendance
- Send appropriate thank-yous; include photos
- Final budget review
- Update the checklist
- Determine how to "extend" event to those who could not attend; update web