



Comprehensive Corporate Event Checklist and Tips

Corporate event planning requires a high level of organization and the ability to think on your feet. Even if you have planned for every potential scenario, one must be ready for last-minute changes and adjustments in order to pull off a successful event. Depending on the size and scope of the event, you may be working alone or as part of a planning team. Whether it is a small local event or a large multiday conference, arranging details for an event can be overwhelming. A comprehensive checklist is critical to tracking all the logistics and details, and to executing an effective corporate event.

Because we measure our success by our clients' success, our goal is to equip each one with the best tools for the job. Please utilize this comprehensive check list from Society 54 to help you efficiently and effectively execute any size event, keeping you both on track and on budget.

- **The Venue:** It is best to make a short list of venues that suit the event requirements, theme, budget, and capacity. Here are all things venue related to be mindful of.
 - **Locations, Dates, Times:** These three items are the first and most important component of any of your event preparation. Once these items are finalized, the basic event planning can take place.
 - **Capacity:** Make sure the room or venue you are researching will comfortably hold all of your guests. Additional consideration will need to be given to the layout needed (classroom, dining tables, etc.)
 - **Services:** Ask each venue for a written proposal that outlines all inclusions, exclusions and expenses. This should include:
 - Parking
 - Storage
 - Security
 - Seating
 - Audiovisual capabilities, etc.
 - **Accommodations:** Book a block of hotel rooms to house guests for the duration of the event, if required.
 - **Site Visits & Walk Throughs:** If you need to visit the property before committing to it, make sure you plan a site visit. It may be appropriate to ask at the visit if you can return for a walk-through with hotel or venue staff prior to the event to ensure details and requests have been communicated properly.
 - **Contracts and Booking:** Depending on the event size, you may need to book up to 18 months in advance and pay a deposit to reserve the venue (the larger the event or conference, whether based on duration or group size, the longer lead time required) especially for large retreat and conferences. Most locations will require a contract to be signed. Be sure to give yourself plenty of time to get approvals for all expenses within your organization in order to avoid any delays regarding booking. Venues often have multiple parties competing for dates, so you may need to act quickly to avoid losing the contract to another interested party.
 - **Insurance:** Make sure the venue has adequate liability insurance and consider buying extra coverage. Check the state and local bylaws to ensure all insurance needs are covered, especially where alcohol is served. In some cases, venues require that you provide insurance as well. In the event your organization does not have liability coverage already, there are online vendors that provide coverage specifically for the dates of your event for a one-time fee.
 - **Timetable:** Finally, once you have booked your location and set your date and time, you will want to create a timeline of tasks and delegate them to the planning team along with clear expectations, deliverables and due dates.

- **Event Activities:** Whether it is entertainment, financial subsidizing or special presenters, be sure any events *within* your event are also handled with enough advanced notice to account for agenda or invitation adjustments that might help to enhance the appeal of your event to your audience.
 - **Entertainment:** Research and book live entertainment (if needed) at least six months in advance of the event. Confirm with the vendor one month prior, and again one week before the event.
 - **Presentations or Workshops:** Identify seating and audio-visual requirements. If A/V needs to be outsourced, be sure to give yourself a few weeks to find the proper vendors. If vendors are included at the venue be sure to set up with them early and confirm your needs
 - **Sponsors and Exhibitors:** Be sure to give yourself plenty of time to solicit sponsors or exhibitors where appropriate. You also need to consider whether or not the event would benefit from donations and/or prizes from any service providers in your industry. In many cases, these organizations can help subsidize event costs for attendees and help you maintain your budget. If that is the case for your event, be sure those in charge of soliciting have proper marketing collateral created and time to do all their outreach.
 - **Speakers:** Book speakers and arrange any necessary travel and accommodations based on their schedule. Confirm final details with the speakers at least two weeks in advance of the event to ensure no changes or conflicts have come up.

- **Food & Beverage:** Not all events will have food and beverage, but some people have come to expect even just a small continental breakfast at the least. Here are tips to ensure you cover all your bases related to the food and beverage elements of your event.
 - **Catering:** Contact several caterers to research and ultimately source the best fit for your needs. Ask for written quotes reflecting the number of attendees, food order, alcohol (based on time or consumption, if required) and correct dates. All caterers should be able to supply this for you. If you cannot get something in writing, it is best to move on to another caterer. In many cases, venues have their own in-house catering team that you must use Others may provide a preferred vendor list from which you may select a caterer based on the venue's relationships and past experiences. In any case, select the caterer that provides the highest level of assurance and value to suit your specific needs.
 - **Inclusions:** Be sure to get a list of everything included with your catering service. Be mindful of anything you may need to rent independently of the caterer, such as:
 - Bar(s)
 - Table settings
 - Dishware and glassware
 - Servers – You may be required to pay additional fees for gratuity for servers and/or bartenders. Be sure to have a clear understanding of what that additional cost will be before signing a contract.
 - **Refreshments:** Provide adequate refreshments and snacks throughout the event, especially those in which attendees are expected to stay on-site. Always have water available to guests, whether bottled or in pitchers.
 - **Breaks:** Be sure to institute breaks in your schedule for longer events. If you have breaks, consider offering attendees snack options along with the regularly served coffee, water, and/or tea, and ensure all are noted (with break times) in your food orders.
 - **Special Diets:** Allow guests the opportunity to inform you of any dietary requirements or restrictions so that you can coordinate with the vendors. Catering vendors are very capable of supporting dietary needs.

- **Promoting the Event:** From invitations to social media promotion, here are all the tasks related to getting folks to your event.
 - **Save the Date:** Send desired speakers, sponsors, exhibitors and/or guests a save the date at least 6 months - 1 year in advance, especially if travel is required. Provide them at least one month's notice for anything in-house that does not require travel.
 - **Appoint Primary Contacts:** Designate individuals as Event Representatives and include their contact information on all invitations and media releases. If the size of the event warrants it, you can create a general email inbox to accept inquiries, just ensure someone is monitoring that email address regularly and responds within 24 hours.

- **Invitations:** Send invitations with agenda, hotel, flight, and RSVP information at least two weeks prior to the event. If a save-the-date was not circulated, the invitations should be sent 4-8 weeks prior.
- **Advertising:** Prepare a marketing media package and add it to your websites, distribute it to newspapers, television stations, radio stations and industry bloggers if appropriate.
- **Staffing the Event:** You've done all this work leading up to the event, but you need help at the event to pull it all off. Here are excellent options to help you navigate the staff support aspect of your event.
 - **Training Session:** Hold regular training sessions or meetings for all event support staff to brief them on the planning status, activities and expectations for the day of the event.
 - **Greeters:** Appoint an adequate number of staff as greeters to welcome guests and offer any support for questions. They can also orient attendees on event activities and getting around the venue.
 - **Freelancers or Event Planning Companies:** Instances of very large events or retreats may require the need for freelance planners or an event planning company to organize and coordinate your event. If this is the case, hold regular meetings with internal staff and the outsourced staff so everyone understands their individual roles and the status throughout the process.
 - **Outside Staff:** Arrange a pre-event meeting with management and staff at the venue (including the catering company) to review expectations regarding service, dress code, rules and contact persons.
- **Paperwork and Finances:** Someone must pay for all the fun activities, swag and most importantly – your time. Here are the items to be mindful of along the way with budgets.
 - **Budget:** Create a budget with your executives or supervisor before the planning process begins. If any large changes come up, be sure to bring it to their attention immediately. Budgets are constantly fluctuating, so prepare for adjustments and changes.
 - **Bookkeeping:** Appoint one planner as Treasurer to manage deposits, payments, receipts and the overall budget.
 - **Licenses & Permits:** Ensure all laws and codes are met with licenses, inspections, liquor service, fire codes, and special event permits. Work with your venue and the city it is located in. Your caterer and venue should be able to provide proof of these.



Quick Tips

1. **You must start somewhere:** To get started, meet with executives and ensure all planners involved have a clear idea of the theme, tone, and purpose of the event. Designate responsibilities so each person knows their duties and role and can be accountable for their contribution to a successful event.
2. **Appoint an event lead** so everyone supporting the event knows who to contact when changes or questions arise.
3. **Don't be afraid to ask questions** and don't be afraid to ask a lot of them! Clarifying important information about the event is crucial. It is better to be overly inquisitive than to make plans that don't align with the designated goals and expectations.
4. Corporate events vary in size and execution, but all have one thing in common: **events must be a positive representation of the host company.**
5. Whether your company is hosting a charity dinner, a staff holiday party, or a conference for industry executives, **it is crucial that your planner put care into even the smallest of details.**

For more tips or to ask any questions about your upcoming event, contact Society 54, LLC.
www.society54.com