

1- Key Resources and Materials (1 of 5 tasks completed)						
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes
Client Contract	Deadillie	Responsible	Status	✓	✓	Notes
Creates a legal relationship that outlines client expectations and project details  The Run Sheet (Event Production Schedule)						
Breaks down the show into segments from start to finish  Event Timeline						
A chronological checklist that keeps the event planning process on track						
Stakeholder Analysis Identifies and develops demands of the stakeholder for a more successful event						
RFP (Request for Proposal) Solicits to potential suppliers like venues, hotels, vendors						
Solitica de potentida depprindo intel Torrados, riordos, Torrados		Completed	1	20%		
		Pending	4	80%		
		Total	5	100%		
2- Objectives and Goals (1 of 4 tasks completed)						
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes
Define Event Objectives SMART- Specific, Measurable, Achievable, Relevant, Time-Bound				$\checkmark$	$\checkmark$	
Determine KPIs						
A quantitative measurement that assesses or gauges the outcome Implement Advanced Analytics						
Data that helps track activities and predict future patterns  Dashboards and Custom Reports						
Helps track performance in real-time						
		Completed Pending	1	25% 75%		
		Total	4	100%		
3- Budget (1 of 5 tasks completed)						
			0.4		D: # 1	
Checklist Item Estimate cost of past events	Deadline	Responsible	Status 🗸	Onsite ✓	Digital ✓	Notes
Determine all items that incur expenses for the event						
Get quotes Staff, travel, venue, entertainment, A/V technology, marketing budget, etc.						
Create budget Grant access with teammates to collaborate						
nclude a section for income and expenses						
		Completed Pending	1 4	20% 80%		
		Total	5	100%		
- Audience/Target Market (1 of 3 tasks completed)						
	Deadline	Responsible	Status	Onsite	Digital	Notes
Create a buyer persona profile Research demographics, online behavior, age group, key trends, etc.	Deadline	Responsible	Status 🔽	$\checkmark$	$\checkmark$	Notes
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Create a buyer persona profile Research demographics, online behavior, age group, key trends, etc. Foster new sponsorships to fund the event Research competition  5- Event Website (1 of 9 tasks completed) Checklist Item	Deadline	Completed Pending	1 1 2 3 3 Status	33% 67% 100%	Digital	Notes Notes
Create a landing/registration page		Completed Pending Total	1 1 2 3	33% 67% 100%	Digital	
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Create a buyer persona profile lesearch demographics, online behavior, age group, key trends, etc.  Soster new sponsorships to fund the event lesearch competition Event Website (1 of 9 tasks completed) Event Website (1 of 9 tasks completed) Event a landing/registration page lipload the agenda locial media links		Completed Pending Total  Responsible  Completed Pending	1	0nsite	Digital	
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Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes
Plan and schedule posts for socials				✓	<u> </u>	
Create press release Increases exposure and reputation						
Event hashtag						
Event logo Colors should be cohesive to event branding						
Create social media pages for the event LinkedIn, Facebook, Instagram, Twitter						
Send push notifications						
Gamification strategy						
What games would you like to include at your event?  Set up games and passcodes						
Provide speaker codes and sponsor codes						
		Completed	1	11%		
		Pending Total	8	89% 100%		
		Total	Ĭ	10070		
8- Agenda (1 of 12 tasks completed)						
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes
Confirm date(s)			~	<b>✓</b>	~	
Confirm start/end time						
Decide on moderator/keynote speaker(s)  Confirm breakout sessions, lunch breaks, etc.						
Create a welcome and introduction						
Decide on discussion topics						
Will the event include Livestream? Setup registration						
Can both virtual and onsite access agenda items?						
Create Q&A for applicable sessions						
Enable polls and live chat for applicable sessions  Add video content						
And These content		Completed	1	8%		
		Pending	11	92%		
		Total	12	100%		
9- Project Management (1 of 7 tasks completed)						
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Checklist Item Identify team member responsibilities and roles	Deadline	Responsible	Status 🗸	Onsite 🗸	Digital ✓	Notes
Define all stakeholders						
Sponsors, exhibitors, producers, emcees, moderators, AV staff, contractors, etc.						
Create a project management spreadsheet and allow access by all team members  List contact information of all stakeholders						
Schedule weekly meetings						
Assign tasks to the team						
Include important deadlines		Completed	1	14%		
		Pending	6	86%		
		Total	7	100%		
10- Registration (1 of 8 tasks completed)						
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Checklist Item	Deadline	Responsible	Status	Onsite 🗸	Digital <b>✓</b>	Notes
Checklist Item List of requirements for registration	Deadline	Responsible	$\checkmark$	<b>V</b>		Notes
Checklist Item List of requirements for registration Set up the registration account Write copy for the site	Deadline	Responsible				Notes
Checklist Item  List of requirements for registration  Set up the registration account  Write copy for the site  Set up the registration form  This may include information to fill out about hotel accommodations or dietary restrictions. Make	Deadline	Responsible				Notes
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Have speakers sign contracts and release forms that allow recordings to be distributed Get presentations and key materials from speakers and provide them to all stakeholders Assign speaker and moderator roles to specific sessions Provide moderator with key agenda materials and cue cards Upload speaker profiles to the event website Give speaker access to registration data and links Send speaker key information to promote the event on their socials Brief speaker and moderator two weeks before the event Speaker and moderator dry run (two days out or as needed) During this process, make sure audio, lights, camera, etc., are running efficiently		Completed		8%		
		Pending Total	11 12	92% 100%		
13- Exhibitors, Sponsors, and Partners (1 of 16 tasks completed)						
Checklist Item  Select affiliate partners  Source sponsors and exhibitors  Curate sponsorship and exhibitor packages Target specific goals of sponsors and exhibitors  Sign sponsor and exhibitor contracts Ask for downloadable assets from all partners  Create banner ads for sponsors Share a copy of the agenda Share onboarding decklexhibitor hall map  Provide a link to support chat Allow access to booth furniture, equipment, virtual booth, etc.  Provide promotional toolkits Ask them to promote their social networks to reach a larger audience  Collect promotional materials from sponsors This could come in the form of swag-like goodle bags, water bottles, brochures, stickers, etc.  Get experiential elements from sponsors to include on the event website  Ex. pre-recorded video messages, behind-the-scenes tours, etc.  Include visual branding on-site  Create sponsor and exhibitor profiles on the event website  Curate follow-up strategies for post-event engagement with partners	Deadline	Responsible  Completed Pending Total	Status	Onsite    Onsite   Onsite  Ons	Digital  Digital	Notes
14- Virtual Event Platform (1 of 14 tasks completed)  Checklist Item  Create a document with a list of requirements for the virtual platform  Research competitor platforms  Contract with a virtual event platform  Work with a support team to build a platform  Include event details, timezone, login details, etc.  Create domain  Setup terms and conditions agreement  Enable privacy policy  Brand platform with customized color palette, logo, etc.  Include agenda, video content, sponsor banners, ads, logos, etc.  Enable polis, live chat, session breakouts, surveys, Q&A's  Create sponsor and exhibitor profiles on the platform  Upload list of attendees, speakers, sponsors, exhibitors  Schedule push notifications  Embed gamification passcodes if applicable	Deadline	Responsible  Completed Pending Total	Status	Onsite	Digital	Notes
15- Travel and Transportation (1 of 10 tasks completed)  Checklist Item  Book travel accommodations for staff Book travel accommodations for speakers Schedule transportation from airport to hotel if applicable Check for shultle services Create a document of arrival times and schedules for all stakeholders Provide staff with company cards Research hotels closet to venue location Negotiate room rates Reserve hotel rooms for staff and stakeholders Reserve staff and stakeholder parking if applicable Create a document with essential travel information for all stakeholders Cancellation policies, expenses, hotel check-in and check-out times, transportation, etc.	Deadline	Responsible  Completed Pending Total	Status	Onsite	Digital  V	Notes
16- Food and Beverage (1 of 8 tasks completed)  Checklist Item  Source catering services  Contract catering services  Decide if alcohol will be served Obtain liquor license if applicable  Calculate and decide on the menu through a budget spreadsheet  Consider dietary restrictions  Determine staffing requirements with the caterer  Provide the caterer with the total number of registered attendees	Deadline	Responsible	Status	Onsite	Digital  V	Notes

If not provided, rent catering equipment Refer to the budget spreadsheet							
		Completed	1	13%			
		Pending Total	7 8	88% 100%			
17- Venue Set Up (1 of 19 tasks completed)							
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes	
Research venues Consider transportation, capacity, amenities, etc.			$\checkmark$	$\checkmark$	$\checkmark$		
Make sure venue meets event needs Speaker stage, lighting, wheelchair accessibility, catering space, etc.							
Contract venue							
Obtain insurance, licenses, and permits required for event Health department permits, public performance licenses, liability insurance, special event							
permits, etc.							
Consider venue cancellation terms and conditions  Map out venue floorplan							
This helps determine where signage, catering, registration, etc., will be Site inspection							
Determine event setup and breakdown times							
Plan seating layout							
Set up badge-scanning booths Set up help desks							
Create name cards/lanyards							
Set up registration tables							
Set up digital equipment  Make sure equipment is fully charged and functional							
Set up branding							
Consider goodie bags for attendees Agenda copies, brochures, feedback forms, etc.							
Prepare directional signage and floor and wall markings Set up sanitation areas							
Plan contests, awards, prizes							
		Completed	1	5%			
		Pending	18	95%			
		Total	19	100%			
18- Health, Safety, and Privacy (1 of 14 tasks completed)							
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes	
Decide if a bag check is required				<u> </u>	<u> </u>		
Provide staff First Aid training Ask the venue for evacuation exits in case of emergencies							
Implement a COVID safety plan							
Decide if on-site testing and/or PPE kits will be required							
Provide Covid related supplies Masks, shields, sanitizer, etc.							
Monitor the latest travel regulations							
Draft refund policy and guidelines							
Educate attendees on event health protocols  Provide multiple forms of entry to create less congested areas of traffic flow							
Implement a social distancing seating chart if needed							
Establish safety and cleanliness guidelines  GDPR Compliance							
Cybersecurity plan							
		Completed	1	7%			
		Pending Total	13 14	93% 100%			
19- A/V Technology (1 of 13 tasks completed)		_					
Checklist Item	Deadline	Responsible	Status	Onsite	Digital	Notes	
Implement live stream production Supportive device bandwidth							
Decide if equipment/device rentals are needed							
Obtain transmitters and receivers							
Test the in-house sound system Assign technicians							
Test projectors / big screens							
Test power sources & distribution							
Collect all promotional content from sponsors and exhibitors  Confirm all design assets and motion graphics							
Provide links to digital space							
Day of event: tech check Ensure internet, cameras, streaming services, etc., are all working correctly							
Create AV schedule of event							
Include important orderly details		Completed	1	8%			
		Pending	12	8% 92%			
		Total	13	100%			
20 – Post Event (1 of 10 tasks completed)							
		D.	0	0 1	D: 11 1		
Checklist Item Debrief with team	Deadline	Responsible	Status 🗸	Onsite <	Digital ✓	Notes	
Upload live stream, photos, and videos from on-site							
Create a blog and post-event content for socials							
Review and assess analytics				_			
Share findings with sponsors and exhibitors							
Share findings with sponsors and exhibitors Send follow-up emails and surveys to attendees Check in with sponsors							

Check in with exhibitors Send thank you messages and important upcoming dates for future events						
Share attendee lists and booth visitors with sponsors and exhibitors						
Analyze the budget for deficit or surplus						
Identify the revenue and profit generated from the event						
	Completed	1	10%			
	Pending	9	90%			
	Total	10	100%			
		Completed	Not completed	Total		
	Total Tasks	20	170	190		
		Applicable	Not Applicable			
	Onsite Status	20	170			
		Applicable	Not Applicable			
	Digital Status	20	170			