

Stress-Free Events. *Guaranteed!*

EVENT PLANNING GUIDE



Event Name

Event Date

Company Name

Location

Client Name

Client Contact Information

Facility

Theme

✓	DUE BY	TASK	NOTES
1 YEAR TO 9 MONTHS OUT			
■	/	Locate property & place on hold	.....
■	/	Have tech crew come in for site visit with you & hotel	.....
■	/	Begin graphic design ideas	.....
■	/	Establish budget	.....
■	/	Look at entertainment elements that work with theme	.....
■		Create a timeline	.....
■	/	Sign contracts with hotel/production	.....
8-7 MONTHS OUT			
■	/	Continue graphic design & staging ideas	.....
■	/	Define speaker possibilities	.....
■	/	Get trade show info in order	.....
6-5 MONTHS OUT			
■	/	Finalize entertainment	.....
■	/	Pay remaining deposits	.....
■	/	Determine theme & graphics	.....
■	/	Printed material well under way
■	/	Start drafting scripts (or message points) for MCs



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✓	DUE BY	TASK	NOTES
4 MONTHS OUT			
■	/	Finalize & print all graphics	_____
■	/	Meet face to face with production crew to determine key people for event <i>i.e. VIP speakers, video 'don't miss', special awards & music beds</i>	_____ _____ _____
3-2 MONTHS OUT			
■	/	Continue work on production schedule	_____
■	/	Finalize load in/out time frames	_____
■	/	Finalize all graphic materials	_____
■	/	Hotel & production crew in communications	_____
■	/	Check final drawings/head counts as near as possible	_____
■	/	All table layouts in place	_____
■	/	All menu items selected	_____
■	/	All linens & centerpieces selected	_____
2-1 MONTHS OUT			
■	/	Finalize all scripts	_____
■	/	Final meeting with production crew	_____
■	/	Final payments sent & received	_____
■	/	Table décor confirmed	_____
■	/	All show elements communicated with production crew	_____
■	/	Hotel & production crew communications ongoing	_____
■	/	Do walk through of show elements	_____
■	/	Review & approve all room setup changes	_____

◀ Walk through timeline, voice overs, production elements, award show elements



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✓ DUE BY TASK NOTES

3 WEEKS OUT

- / Final walkthrough of show days ← Check PPTs for sizing, text size, messaging & spelling errors
- / Final script writing
- / Final PPTs delivered & reviewed
- / Final review of on screen delivery
- / Establish rehearsal times for all speakers
- / Establish room for ppt production check & teleprompter rehearsals

2 WEEKS OUT

- / Confirm travel with production crew
- / Confirm rooming list
- / Confirm rehearsal times with VIPs
- / Confirm scheduling changes
- / Work on PPT changes from speakers
- / Stay on top of last minute changes
- / Finalize VIP schedules for rehearsals



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✓ DUE BY TASK NOTES

3 DAYS OUT

- / Event crew arrives at hotel
- / All A/V elements confirmed
- / All DVDs delivered
- / All voice overs checked & confirmed
- / Final drawings delivered to hotel
- / Load in begins

2 DAYS OUT

- / Load in continues
- / PPT rehearsals & reviews by show crew & meeting planner/communications
- / Final approval on all PPT/DVD/Video
- / Final tech meeting with all show crew & meeting planners
- / Final script walk through with producer
- / Final production walk through with producer



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✓ DUE BY TASK NOTES

1 DAY OUT

■	/	All show elements loaded & ready to go	
■	/	Tech rehearsals with show crew only	
■	/	Tech rehearsals & sound check for all speakers	◀ Different day of show speakers can rehearse on different days
■	/	All teleprompter/PPT runthroughs with speakers should be in rehearsal room NOT main show area while PPT reviews are happening in separate room	◀ To alleviate all speakers & spectators from being held up by PPT changes
■	/	Sound checks can be done simultaneously in general session room	
■	/	Speaker rehearsals should be scheduled half an hour apart for full walk through once	
■	/	PPT corrected & changes made	
■	/	Teleprompter rehearsals should be scheduled at appropriate intervals to complete changes & reorganizations	

SHOW DAY!