

The Ultimate Corporate Event Planning Checklist

Tasked with planning a corporate event and looking for a little help? Or maybe you're a seasoned event planning professional seeking fresh inspiration? We understand there's a lot to consider, from booking the venue to arranging transportation and accommodation for attendees.

As a conference planning manager, you have a lot on your plate. Whether you're running an in-person, hybrid, or virtual event, this checklist provided by the team at [Stonewall Resort](#) is designed to guide you every step of the way.

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Planning an Effective & Engaging Corporate Event

When it comes time to plan your event, you'll want to get organized as early as possible. This includes establishing your event objectives, selecting a date, developing a master plan, and creating a budget.

Once you have those core pieces in place you'll want to secure sponsors and speakers, coordinate with suppliers, begin publicity, and, of course, manage setup and execution.

Don't forget to conduct a post-event survey!

Here's our checklist to kickstart the process.

Six months prior:

The further in advance you can start planning, the better! Create an Event Master Planner to help coordinate all the details.

The Event Master Planner is a living document that will be used to track every detail of your event. This should include information on the venue, speakers, sponsors, suppliers, schedule, and budgeting.

[>> COPY THIS EVENT MASTER PLANNER TEMPLATE <<](#)

SET GOALS AND OBJECTIVES

If your goals and objectives are clear, it makes the rest of the decision-making process much more manageable. Any decisions must be vetted against the overall goals for approval. For instance, if your meeting is for training purposes, you don't need to order matching shirts or plan extensive team-building activities, but hiring an expert speaker could be a good investment.

It's all about knowing your target, then making plans to get there the most efficient way possible.

My goals and objectives for this event are:

DETERMINE YOUR BUDGET

Budgets rule the world, and they rule business, and they rule meeting plans. However, no matter your budget, you can build an extraordinary meeting that will meet or even exceed everyone's expectations.

Here are some budget-saving tips:

- Plan your meeting midweek when most venues are less expensive
- Cater dessert or Hors-d'œuvres rather than a full meal
- Utilize venue meeting planners rather than hiring an outside organizer. Venue meeting planners have seen it all, they are professional, and they often have great ideas for saving money, particular to the venue.
- Send invitations with RSVP via email rather than postal service.

TIP: Use the Budget Planning Tab in the Event Master Planner link from above.

RECRUIT AN EVENT COMMITTEE

Select an event manager, determine your committees and establish sub-committee chairs.

Committees:

Chair:

FIND A VENUE & SET THE DATE

Finding the venue and setting the date go hand in hand.

Be sure to avoid holidays and think through the busiest times in your business and personally.

If you know there will be a big project due for some departments, plan the meeting for after so they aren't stressed about taking a day off. Further, summertime and around the holidays are challenging times to arrange meetings because your staff is already busy in their personal lives.

Check with the venue to see if they offer discounts on certain days or times of the year as you're planning.

Venue options:

Venue 1

Venue 2

Venue 3

IDENTIFY SPONSORSHIP PACKAGES

If your event needs a financial boost, securing sponsorships is a great way to do it.

Conference sponsorships can help with everything from funding to in-kind donations and can be a win-win for your organization and the sponsor.

Before you start reaching out to potential sponsors, put together a sponsorship packet that outlines the benefits of sponsoring your event. This should include information on your conference attendees, your marketing and publicity plans, and the sponsorship levels and benefits you're offering.

Sponsorship Packages:

Projected Cost

Package A

Package B

Package C

CREATE A WEBSITE

For larger events, a website - or microsite - can be a great way to house all the information your attendees will need in one place. This includes the conference schedule, speaker bios, hotel and travel information, and more.

If a website is not in the cards, no worries! You can also create a Conference Guide that can be distributed digitally or in print.

CREATE A PUBLICITY PLAN

For large-scale event, multi-day events, you'll want a publicity plan to encourage attendees, vendors and attendees.

- Develop draft program
- Develop publicity pieces - logo, press release, media kit materials, promo video
- Develop media list
- Create a Facebook event page
- Register your event on a variety of online event calendars
- Create some buzz on your blog or member forums
- Determine VIPs and create invitation
- Order any desired event swag

ADVERTISE WITHIN THE OFFICE

Build some excitement about your meeting. You're working hard to plan an event from which everyone will benefit. Advertise early and encourage staff to mark their calendars and make their reservations ASAP!

Four months prior:

VENUE LOGISTICS

With your date, sponsors, and venue location locked in, it's time to coordinate with the venue event manager on logistics. This includes everything from audio/visual needs to food and beverages.

- Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc. If virtual, check registration pages, do tech check-ins with speakers, test virtual experiences, etc.
- Review security needs/plan for the event with venue manager
- Investigate need for any special permits, licenses, insurance, etc.
- Assess accessibility requirements (e.g. all-gender restrooms, wheelchair accessibility, etc). If virtual, this may include live captioning, platforms that work with assistive technology, inclusive design on pages, etc.

- Communicate accessibility requirements to staff.

HOT TIP: This is also a great time to work with the venue on room blocks for attendees who may need overnight accommodations. Most hotels will offer a block of rooms at a discounted rate for conference attendees.

DETERMINE YOUR THEME

Not all meetings have a theme, but if it fits, it can add interest to the day for sure. For instance, a luau theme can be fun if you're located in the north, and your meeting is planned for the dead of winter. Even pretending summer can cheer folks up.

Theme Ideas

Theme 1

Theme 2

Theme 3

HIRE SPEAKERS

Hiring a speaker can be quite an investment, but it can make your gathering much more memorable. If there is a speaker you can feasibly bring in that will entertain or educate your team, and that you can afford, that can increase your ROI.

HOT TIP: When hiring speakers, be sure to work with them to arrange lodging (you'll want to consider the payment method; ie master billed or individual pay). There is nothing more stressful than finding out your speaker(s) doesn't have lodging!

Speaker Options

Speaker 1

Speaker 2

Speaker 3

PLAN YOUR FOOD

As stated above, you should plan your food depending on your budget. There's no shame in offering a small meal or just dessert rather than a full course meal. However, if you'd like to provide a full meal, start talking with your caterers early so you can get the menu and budget planned well in advance.

DECIDE ON GAMES & TEAM BUILDING ACTIVITIES

Games are great for ice breakers or to break up long training sessions, but their most significant value can be in team building.

Some advantages to team building games are

- Improved relationships
- Team cohesiveness
- Learn to work together
- See each other's strengths
- Improved morale
- Increased creativity
- Greater motivation

[Get Team Building Ideas Here >>](#)

SECURE SPONSORSHIPS

Utilizing the packages mentioned before, reach out to corporations, small businesses, and other organizations that you think would be a good fit. Conference sponsorships can be a great way to offset the cost of your event, so don't be afraid to ask for a little (or a lot!)

Confirmed Sponsors

Sponsor 1

Sponsor 2

Sponsor 3

Three months prior:

FINALIZE SPEAKERS DETAILS

This is the time to finalize speakers presentations. You'll also want to set up travel arrangements, and add bio and presentation details to your materials. Don't forget to ask speakers to also promote to their networks!

FINALIZE SPONSORSHIP DETAILS

Follow up to confirm sponsorships and finalize any details that need to be ironed out. This includes sending over your Conference Guide or website, confirming branding and marketing plans, and getting any additional materials you may need from them.

COORDINATE WITH SUPPLIERS

Confirm all Conference details with your suppliers, such as catering, audio/visual, signage, and decor. This is also a good time to review your contracts and make sure that all the details are still accurate.

One to Two months prior:

SEND REMINDERS & COMMUNICATE OFTEN

As the Conference date gets closer, you'll want to start sending reminders to attendees, speakers, and sponsors. This can be done through email blasts, social media posts, or even good old-fashioned snail mail.

You should also be communicating frequently with your Conference team to ensure that everyone is on the same page and prepared for the big day.

Three to four weeks prior:

Verify lodging for your speakers and VIPs

Arrange for speaker and VIP amenities (if applicable)

- Arrange for speaker and VIP transportation (if applicable)
- Work with the hotel to get CEOs/BEOs Catering/Banquet Event Orders signed
- Compare meeting registration with hotel(s) roster
- Work with hotel(s) for additional guestrooms if attendance is expected to go over contracted numbers or conversely plan for payment/mitigation of unused guestrooms if attendance will be lower than expected.
- Review conference room set up with speakers/facilitators

Week prior:

By this point, you should have most of the event details confirmed. All that's left will be final touches, such as:

- Check-in with all vendors
- Check in with committee members
- Double-check RSVPs
- Coordinate with the venue event planner for on-site logistics
- Prepare attendee welcome packet/hotel information/schedule of events/entry tickets and etc.
- Review VIP rooming assignments
- Review billing arrangements with hotel(s) (tax exemption, direct billing, pre-payments)
- Confirm dietary requests with hotel
- Confirm hotel portorage schedule

Day prior:

It's finally here! The Conference is tomorrow and there are only a few things left to do:

- Is signage in place?
- Are the registration, vendor, sponsor and media tables prepared?
- Are promotional materials on-site?
- AV check

Day of:

- Meet hotel point of contact, conference managers, front desk, concierge, etc.
- Check speaker/VIP amenities
- Check hotel signage (make sure any last-minute room changes are communicated)
- Check Conference room(s) set up (reminder, last-minute setup changes may incur additional costs)

Daily During Conference:

- Review CEO's with hotel staff
- Review all master account receipts with hotel
- Review no-shows and cancelations with hotel and verify billing arrangements
- Review banquet checks with hotel staff

Post-Event Follow-Up

Breathe!

After the Conference is over, it's time for a little post-event follow-up. This includes sending thank-you notes to attendees, speakers, and sponsors. You'll also want to collect feedback from

your team and make plans for next year's Conference and arrange a post-con with the hotel to review feedback. Discuss dates for rebooking (if applicable) The early bird gets the preferred dates!

About Stonewall Resort

West Virginia's only lakeside conference center, Stonewall Resort's IACC-approved space features modern meeting technologies, natural light, engaging furnishings and decor, as well as access to views of the lake and rolling mountains beyond. Supported by experienced IT and meeting professionals, and served by our expert culinary team, your small meeting or large conference will enjoy success against the backdrop of nature.

To learn more, call us at 304.269.7400.