


# Event Planner Check List



Event





It's time to re-allocate some of your marketing budget for virtual events and focus on developing useful online options that people can check in and interact.

A good marketing plan will help you drive event registrations, build brand awareness, and grow your contact base.

If you are looking for a quick reference guide for organizing your 'event marketing campaign', you have landed at the right spot.

This checklist template will help you with structuring your campaigns

*You can customise it to your needs.*



Stages	Activity	Description	Dependency	Remarks	Deliver by	Status
Setup	Email id setup for campaign	Setup one email dedicated for all correspondence with registered participants. This email id will be used to set reminder emails and for users to send queries to.				
	Virtual event setup	Select an option for virtual event - Zoom account / GoToMeeting, YouTube Live				
	Topics and date	The topics for the event to be decided along with subtopics that will be covered. This will help choose the right speaker. Once the topic is fixed, two suggestive dates must be proposed				
	Event agenda / mode of event	The agenda of the event will not be limited to topic(s) but the overall flow of the event right from introduction, topics covered, panel discussion (if any). Mode of event can be webinar (live or pre-recorded), panel discussion, presentation, masterclass				
	Speakers availability confirmation and Speaker details	Select / Shortlist yours speakers for the event, each with a specific knowledge and skill set. Create a Google drive folder for each speaker - folder to have hires pictures of the speaker, their profile, contact information, their presentation / recorded video (as the case may be)				
	Landing Page for event	All users must be redirected to a landing page which will act as a virtual brochure for the event. This can be created using Hubspot, Splashtat, hey summit or any other software				

Stages	Activity	Description	Dependency	Remarks	Deliver by	Status
Promotion	Ad campaign goals	Goals is a measure of the success and performance of the campaign. It can be number of registrations, attendance, growing your social media groups (say your event IP) etc.				
	Marketing budget allocation	A fixed approved budget that must be allocated to different marketing sources including facebook, LinkedIn, google etc. [If there is any offline marketing, that budget should also be considered - offline not relevant at this time]				
	Ad campaign duration	Start and end date of each marketing campaign				
	Facebook/ Instagram marketing	Set up - target audience, budget for each campaign, duration of each campaign, type of ads				
	LinkedIn marketing					
	Google display ads marketing					
	Email campaign		Set up - email id database, email workflow for each open or click of mail, call to action for each mail, follow up schedule			

Stages	Activity	Description	Dependency	Remarks	Deliver hy	Status
Assets	Marketing material design	The landing page will be the pillar of the campaign. It will include a brief about the event, speakers, date and venue details, who should attend, fee structure, rules and terms to be followed, sponsors list, contact information, social media links				
	Landing page content	All copy content including caption content, artwork content, creatives used, colours must be approved				
Posts / Ads	Facebook/ Instagram marketing content					
Posts / Ads	LinkedIn marketing content					
Ads	Google display ads content					
	Social media group - pages					
	Hashtags - ist	Define and register all long term assets				
	Email content	Each mail content should have - subject line, body of the email, call to action, registration link, social media link				

Stages	Activity	Description	Dependency	Remarks	Deliver by	Status
	Presentation content	The presentations should be a ppt that will be shared with the audience during the event. It should have a title card, speaker names, agenda, topics covered, summary of points discussed, a slide for questions and thank you. If other formats are used - like video or recorded website, a suitable flow may be set-up including a process for receiving questions, feedback and sending responses.				
	Speakers profile	A 100 word brief about each speaker must be included in the moderator speech. The brief should include their name, current title, experience, accolades, and topics they will cover. For asynchronous events, landing page shall play this role and each video or recorded webinar shall have necessary provisions for such introductions				
	Email invite	HTML version of email content should be setup with email database				
	Reminder					
	Follow-up post event					
Dry Run		All email campaigns (full flow), landing pages, ad campaigns, data capture forms, AV, conference platform (e.g. Gotomeeting), and internet connectivity must be tested and approved by someone who is NOT involved in any of the above processes but understands all tech aspects and business objectives of the event.				

An event is a difficult process to plan and execute. But approach it with a "*snackable*" strategy and in no time you will have your first case.

If you are trying to attract new clients, create your contact list, or raise money for your non-profit, online events can be a great option and most fun for your customers.

**BlueOshan** is on-call and we are working from home too! [Do let us know if you need](#) any support with marketing your event.. We are happy to help!

Hope you find this checklist useful..

**Stay Safe**