

brandworks Event Planning Checklist

On average, it can take up to 12 weeks to effectively plan an event.

This checklist will walk you through the steps to planning a great event and will also offer some extra tips and tricks.

Weeks 10 - 12

- Choose and confirm event date & location
 - Date - When choosing an event date, you need to investigate and consider the following:
 - Competitive events - is a competitor holding an event the week you choose?
 - Association events - if IFMA, ASID, IIDA, etc holding an event that week? If you don't know, ask a few of your better customers for their thoughts.
 - Holidays - be sure your event is not going to infringe on a country (i.e. President's Day) or religious holiday (Yom Kippur)
 - Citywide events - check with your local tourism bureau to ensure that you are not planning an event during a citywide event which could cause lack of interest in your event, city congestion, traffic and parking problems. For example, if you are in Chicago, it is best not to try to plan an event during "Taste of Chicago" or Bluesfest.
 - Location events or restrictions - if your dealership is located within a building or complex environment, before you announce your event it is wise to check with your building owners to be sure there are no conflicting events or restrictions on holding an event. Many buildings will require additional security personnel or a walk through of your space with a fire marshal. Plan for it rather than being surprised.
 - Location - The best place to hold an event is in *your own space*. If you are considering a space other than your dealership, you will need to contemplate the following:
 - Find a location that has enough cache to help draw your crowd
 - The location should be centrally located for the majority of your intended audience
 - You will need to confirm availability and secure the space with their events person
 - Check parking availability! Nothing is worse for your guests than having to search for a parking space. You will also need to consider paying for parking if a parking structure or lot charges for parking after business hours.
 - You will have to pay additional fees for space rental
 - You may be stuck using certain caterers
 - You will have to be sure you can move your product in and out of the event space - you may have limited accessibility to the space before and after the event
- Evaluate the product
 - Do you have the product in your space? Is it in the best possible condition? If you have punch list items that were not completed, now is the time to make your display shine!

Weeks 8 - 10

▪ Invitations

- Invite information - identify the following info for the invitation:
 - Day and date of event (i.e. Thursday, April 28th)
 - Location of event - dealership name and street address
 - Time of event (i.e. 5:30 pm - 8:30 pm) - Include an end time as this will give your guests a window of time during which they could come or go
 - RSVP information - your RSVP info should be a contact name, phone number and an e-mail address - it is important to give people more than one way to RSVP
 - Additional important info - is there a particular place to park that is not obvious? Is your dealership hard to find? Should you include cross streets in your location details? (i.e. 123 Main Street; Corner of 8th and Main)
 - **IMPORTANT - DOUBLE CHECK INVITE PROOF BEFORE APPROVING TO PRINT!!**
- Invite quantities
 - Each dealership employee should put his invite list into an Excel spreadsheet - this is important as all final lists should be combined into a master list, merged and purged of duplicates. Excel makes this easier.
 - Once the lists are compiled into one master list, print mailing labels on clear labels - they are better than white labels. Avery makes clear labels that work well in a laser printer.
 - Overestimate your invite quantity needs by about 20% - this gives you extras to personally hand out on client visits.

Weeks 6 - 8

▪ Catering

- Choose a caterer
 - Most caterers have standard menu items from which to choose
 - Ask your caterer if he or she can handle your bartending as well - most should be able to handle alcohol but if they can't, they should be able to recommend someone for you
 - Plan a walk through of your space with your caterer before the event to identify any additional rental needs (bar set up, etc.) If your caterer does not rent what they need, they will be able to recommend a rental company.
- Food selections
 - Do not choose anything that requires a plate or utensils - the best items are simple and can be eaten in 1-2 bites
 - Choose at least 2 items that would appeal to vegetarians
- Beverage selections
 - Keep alcohol simple - a gin martini, a vodka martini, red wine, white wine - a full bar is not necessary
 - Non alcoholic beverages should include sparkling water and a lemonade or non-alcohol cooler that can be served in a high ball glass
- Linens and paper goods
 - Black and white linens are best when needed for bar setups and food station setups
 - Plain white or back cocktail napkins are appropriate
- Glass and china ware
 - Real glass is best
 - For food stations items, small 4" china plates are wonderful. However, your caterers may require you to rent them (this is standard procedure

in most cases). Because charges do add up, simple plastic plates in clear or black are acceptable.

- Florals (if needed)
 - Florals add a nice touch to any event - they can be simple, low cost and can still be classy
 - Your caterer should be able to recommend a florist with whom they have worked before
 - Do not use any florals or greenery that tends to "shed" (i.e. asparagus ferns, pollen should be removed from any lilies, etc).
 - Locations for florals include:
 - Reception desk
 - One larger arrangement on the bar
 - Small arrangements as needed on food stations

Weeks 4 - 6

- Invitations
 - Invites should go in the mail about 5 weeks before the event
- Product
 - Is your product complete?

Weeks 2 - 4

- Invitations
 - Evaluate RSVPs
 - This is the time to follow up with clients and firms by hand delivering additional invitations while in their offices
- Catering
 - Finalize menu and alcohol items
 - Pay catering deposit (usually 50 - 75% of total estimate)
 - Confirm that your caterer has arranged florals, per your request
 - Confirm that your caterer has arranged any additional rentals, if needed, per your request
 - You may need to place deposits for either the florals or additional rentals if your caterer is not able to bill you directly for the florals and rentals

Weeks 1 - 2

- Invitations
 - Evaluate RSVPs
 - Each dealership employee should call those on their invite list who have not RSVP'd yet - you should have a 95% complete attendee list roughly 7 days before the event
- Space
 - Confirm event with your building operations if necessary
 - Confirm that restrooms, if located outside your space, will be accessible during the event
- Catering
 - Do the final walk through with the caterer and florist if it has not happened before now - this is VERY important as this gives the caterer an opportunity to scope out prep locations and to visualize flow through your space
 - Your caterer will request a final "expected attendance" number to guarantee food and beverages
- Space
 - Plan to arrange for extra attentive cleaning both the afternoon/ evening before the event and for the morning following the event - caterers usually do a wonderful job but they are not responsible for your guests or your space

- Product
 - Is your product complete? Now is the last time you will have to do a thorough check of your product. If you notice any discrepancies, you still have time to make corrections. Don't delay!
 - Give consideration to propping - less is more!
- Team
 - Communicate to your team that you will not be able to host clients in the showroom during the afternoon before the event - it will be distracting to your client as well as to your caterer. Instead, invite your client to your event!

Day before

- Catering
 - Call your caterer to confirm his / her arrival time in your space as well as any special needs he / she may have
 - Clean up any and all spaces the caterer may need to use for preparation - no one wants to have to "work around" someone else's mess
- Music
 - Confirm that your sound system works and check volume levels
- Space
 - One last walk through cannot hurt
 - Have your cleaning crew do a thorough job
 - Ensure that restrooms will also be cleaned
- Team
 - A team meeting should be held to do the following:
 - Ensure that all team members are aware of the hours of the event
 - Share names and pertinent information on any "special" guests planning to attend
 - Make sure that your team members will be there from the time the event begins until it ends. You never know if a guest will straggle in late and it might be YOUR client!
 - Discuss that all team members are responsible for the success of the event
 - Discuss dress code for event

Day of the event

The most important thing is to have fun and be sure your guests are enjoying themselves. This is not the time to do a heavy sales pitch; it IS the time to "soft sell" your guests and to expose them to your dealership and Haworth.

- Invitations
 - If the weather is expected to be crummy, make a few last minute calls to ensure attendance! Sometimes a little encouragement is needed!
- Catering
 - Your caterer should arrive hours in advance to set up and begin prep
 - Discuss with your caterer how you plan to wind down the event if it is still going strong past the time you had planned. It is best to discuss ahead of time than to have to scramble to ask your caterer to close the bar!
 - You may need to pay your caterer the balance of the bill. If your caterer is going to bill you, pay them promptly! You never know when you will need to use them again!
- Florals
 - Florals should not arrive until the day of the event in order to ensure that they are the most fresh.
- Space

- Put away anything aside from props in display space.
- Your personal offices need to be clean and tidy. Do not leave any sensitive paperwork on your desk. It is tempting to peek!
- Lock away your laptops and lock your desk drawers. Women need to lock purses up as well. You never know what may “walk off”.
- Product
 - Take a final look at your product!
 - Clean all surfaces of dust and finger prints.
 - Open and shut files and flippers - is there anything stored in there that you would not want exposed? If so, lock the drawers!
- Music
 - Turn up the music before the event begins - no one wants to walk into a lifeless space.
- Team
 - All team members should be at the event 30 minutes before it begins - it's a nice time for an impromptu meeting and no one should be walking in at the same time as their clients.

The day after

- Catering
 - Your caterer should have removed all items from your space the night before.
 - It is a good idea to touch base with your caterer to review any questions or concerns you may have for future events.
- Florals
 - Florals are yours to keep so enjoy them!
- Space
 - Chances are that your space is in need of a deep cleaning! Have this completed by noon to ensure your space is back in working order.
 - Unlock all files and peds that you may have locked the night before - no one likes to hunt for keys when a client is waiting.
- Product
 - Ensure that your product is in good condition and has not sustained any damage.
- Team
 - A follow up meeting is a MUST while memories are fresh.
 - Compare notes regarding attendance and conversations.
 - Decide on a follow up tactic such as personal thank you notes or phone call.