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|  | **Event Strategy** | |  |
| **Objective** | Aim of event: |  | |
| Target Audience: |  | |
| Measure of Success: (SMART) |  | |

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|  | Item | Description | By | Date |
| **Event Details** | | | | |
| **Details** | Event Name: |  |  |  |
| Event Date: |  |  |  |
| Event Type: |  |  |  |
| External Venue: (Y/N) |  |  |  |
| Venue Booked: |  |  |  |
| Venue Details: |  |  |  |
| Venue Contact Name: |  |  |  |
| Venue Contact Info: |  |  |  |
| **Catering** | Catering Required: (Y/N) |  |  |  |
| Catering Company: |  |  |  |
| Catering Contact Info: |  |  |  |
| Catering Needed: |  |  |  |
| Catering Covers: |  |  |  |
| Catering Timings: |  |  |  |
| **Owners** | Lead Team Member: |  |  |  |
| Lead Marketing: |  |  |  |
| Lead BD Rep: |  |  |  |
| Additional Team (s): |  |  |  |
| Speaker(s): |  |  |  |

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| **Key Milestones** | **Responsibility** | **Complete Date** |
| Planning meeting |  |  |
| Objectives agreed and event proposal submitted |  |  |
| Budget approved |  |  |
| Internal awareness and agree hosts |  |  |
| Topic and dates agreed |  |  |
| First draft of invitees |  |  |
| Identify venue and book |  |  |
| Identify PR opportunities |  |  |
| Mailing list approved |  |  |
| Invitation wording and design approved |  |  |
| Mailing delivered |  |  |
| Confirmation email to hosts |  |  |
| Place names, name badges, guest lists, literature |  |  |
| Banners, promotional material ordered |  |  |
| Add as required… |  |  |
| Add as required… |  |  |
| Add as required… |  |  |
| Add as required… |  |  |
| **Post EVENT** |  |  |
| Post event follow up - feedback |  |  |
| Event debrief on |  |  |
| Event report by |  |  |

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|  | Item | Description | By | Date |
|  | **Event Administration** | | |  |
|  | Activity Schedule: |  |  |  |
| Outlook Diaries: |  |  |  |
| CRM Campaign: |  |  |  |
| Marketing Calendar: |  |  |  |
| Add to Website? (Y/N) |  |  |  |
|  | **Event Checklist** | | |  |
|  | **10 Weeks** | | |  |
| **Data** | List Required: (Y/N) |  |  |  |
| List Requested: (Y/N) |  |  |  |
| List Circulated: |  |  |  |
| List Approved: |  |  |  |
|  | **8 Weeks** | | |  |
| **Invitation** | Invitation Required: (Y/N) |  |  |  |
| Invitation Format: |  |  |  |
| Provisional Send Date: |  |  |  |
| Invitation Drafted: |  |  |  |
| Invitation Approved: |  |  |  |
| **Banners** | Banners Required: (Y/N) |  |  |  |
| New Design: (Y/N) |  |  |  |
| Banner Details: |  |  |  |
| **6 Weeks** | | | | |
| **Equipment** | Equipment Required: (Y/N) |  |  |  |
| Equipment List: |  |  |  |
| Equipment Booked: (Y/N) |  |  |  |
| **Literature** | Literature Required: (Y/N) |  |  |  |
| New Required: (Y/N) |  |  |  |
| Literature Details: (Y/N) |  |  |  |
| **Merchandise** | Merchandise Required: (Y/N) |  |  |  |
| Merchandise Needed: |  |  |  |
| In Stock: (Y/N) |  |  |  |
| Merchandise Booked: |  |  |  |
| **OR** | | |  |
| Order New: (Y/N) |  |  |  |
| Supplier Details: |  |  |  |
|  | **4 Weeks** | | | |
| **PowerPoint** | PowerPoint Required: (Y/N) |  |  |  |
| PowerPoint Drafted: |  |  |  |
| PowerPoint Approved: |  |  |  |
|  | **3 weeks** | | | |
| **Chaser** | Chaser Required: (Y/N) |  |  |  |
| Provisional Send Date: |  |  |  |
| Chaser Drafted: |  |  |  |
| Chaser Approved: |  |  |  |
| **PR** | Identify PR opportunities: |  |  |  |
| Circulate on Social Media: |  |  |  |
|  | **2 weeks** | | | |
| **Set-up** | Finalise pack list: |  |  |  |
| Finalise layout plan: |  |  |  |
| **1 WEEK** | | | | |
| **Confirm** | Host reminder email |  |  |  |
| Guest confirmation email |  |  |  |
|  | **Other Details** | | | |
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Typed by | Date typed