



Event Planning Promotion Checklist

Use this event planning checklist as a guide for planning & promoting special events.

16 Weeks Before the Event

- Appoint an event coordinator.
- Set the date, time and place of the event.
- Establish event budget and identify potential partners/sponsors the event.

15 Weeks Before the Event

- Compile invitation list. Include customers, prospects, and other businesses in the community. Consider inviting members of your local chambers of commerce, economic development council, city council, and colleges & universities.
- Outline your promotional efforts. Begin planning the schedule for your website, email marketing and social media campaigns.

12 Weeks Before the Event

- Call potential partners and sponsors of the event to assure pledges of sponsorship and determine the roles everyone will play. Send follow-up letters detailing the event and what the partner has agreed to provide.
- Contact the caterer to order food and beverages for the event.

8 Weeks Before the Event

- Place listings and/or advertisements in local newspapers and community calendars. Also consider placing ads for the event in local broadcast media and on social media platforms.
- Create invitations that include an RSVP that is due at least one week in advance of the event. Allow time for follow-up calls to the non-responders.
- Order event display materials, if necessary.



6 Weeks Before the Event

- Add the event to your chapter website.
- Arrange for audio-visual equipment such as a podium and microphone, if needed.

5 Weeks Before the Event

- If appropriate, have door prize selected and ordered.
- Distribute email invitations to your newsletter subscribers.
- Share the event information with sponsors and partners to be promoted to their customers.

3 Weeks Before the Event

- Send news release about the event to local media.
- Distribute email invitations to your newsletter subscribers.

2 Weeks Before the Event

- Distribute email invitations to your newsletter subscribers.
- Make calls to the media to generate interest in the event.
- Post flyers publicizing the event in your office, bank branch lobbies, convenience stores, libraries and other locations in your community.

1 Week Before the Event

- Distribute “last call” email invitations to your newsletter subscribers.
- Notify caterer about the number of attendees expected.
- Visit the site of the event to familiarize yourself with the layout. Pay special attention to the location of the electrical outlets, light switches, telephones, trashcans, coat checks, and restrooms. Meet with the audiovisual expert, if appropriate. Make sure there will be A/V support throughout the event in case of glitches.
- Assign a greeter for the event.
- Make name tags for the event.
- Pack supplies, such as a box to collect business cards, door prize, collateral (brochures, business cards, etc).

The Day of the Event

- Arrive early for one last walk through of the facility.
- Position greeter to be the first person attendees see when entering room.
- Give everyone a name badge as they enter and encourage the exchange of business cards.

After the Event

- Write appropriate thank you cards, emails and/or letters.
- Send news release to local media announcing outcome of event.
- Email the guests to thank them for attending; Following up on leads obtained at the event. Ask them to subscribe to your newsletter and learn more about your company.

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