

CLIENT EVENT PLANNING CHECKLIST

Use our client event planning checklist to simply your next event



6 to 8 Weeks Before

Action	Assigned To	In Progress	Completion Date
Determine Type Of Event			
Prepare A Budget			
Select A Date, Time & Location			
Establish an R.S.V.P. Process			
Create Invitation List			
Prepare Invitations			
Prepare Educational or Handout Information			

3 to 4 Weeks Before

Action	Assigned To	In Progress	Completion Date
Mail Invitations			
Confirm R.S.V.P. Process With Team or Sales Assistant			

1 to 2 Weeks Before

Action	Assigned To	In Progress	Completion Date
Prepare Agenda (Introductory Remarks, Welcoming Clients & Guests)			
Call Invites Who Have Not Responded With Encouragement To Attend			
Confirm The Location Reservation & Specific Needs-(Seating, Parking, Vouchers, etc)			

Day Before

Action	Assigned To	In Progress	Completion Date
Confirm Attendance With Guests			
Create Name Tags			
Review Agenda & Introductory Remarks			

At The Event

Action	Assigned To	In Progress	Completion Date
Arrive 60 to 90 minutes early to organize last-minute details			
Determine Who Will Help With Details During The Event			