



The Ultimate Event Planning Guide

Your step-by-step strategic and logistic guide for planning a large event and making a maximum impact using memberplanet.

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Introduction

memberplanet takes the guesswork out of event management by providing the tools you need to execute your event like a pro.

Increase operational visibility - get an accurate headcount, collect the guest info you need, view reporting, and so much more.

Streamline admin tasks with event pre-registration, selling tickets and merchandise, and taking payments at the door.

Engage with a broader audience by sharing your event page on your website or social media, send emails and texts to announce the event, and tailor your messages to target recipients based on member data.

The perfect event begins with a plan, and we're giving you *this* one to guide you to success. Everything is broken down by stages, from planning to follow-up, and a broad timeline. We've categorized helpful steps in strategic and logistic to-do list items, so you can delegate to your team members according to their strengths. The general rule of thumb is, the earlier you can do them, the better. Happy planning!



Planning Your Event

12 to 6 months out

From the very beginning, you'll want to build a team to help steer your event on the path to success. Event planning is like sports – a team consists of players who each hold specific roles, and each member reports to the Captain. Your event, especially if it's complex, should have a team that reports to a project manager (this might be you!) or someone who can hold each person accountable for their responsibilities and ensure that the overall game plan is executed smoothly.

Strategic steps

- Set up an event committee. Start drafting and recruiting your all-star team to oversee planning. It will help keep time-sensitive tasks top of mind.
- Set up your first few planning meetings, even if it's to agree on the timelines for the next months, or a general implementation plan.
- If this is a themed event, start brainstorming ideas
- Plan the budget.

Logistic steps

- Research and book the venue. Reserve dates for the entire year if you host a recurring event. Or put next year's annual event on the calendar.
- Research and book vendors.
- Start building a contact list including emails and other important info.



Building an all-star team

If your event committee is limited in staff, it's perfectly fine to have them take on multiple roles as long as they're clearly defined. The number of necessary roles will vary depending on the nature of your event, but plan to cover these basic responsibilities.

Project Manager – The one who oversees the entire event committee, the planning, and execution. This person makes top-level decisions, drives strategy, manages the budget, and usually reports to a high-ranking officer in your organization.

Communications & Marketing – This team handles guests and public relations. Prints everything the guests need, including maps, directions, and a physical ticket if necessary. Works closely with creative and handles all aspects of the event promotion.

Scheduling & Program – Awesome schedulers take care of booking speakers, entertainment, planning meetings, and making sure the entire program rundown goes off without a hitch. After all, timing is everything!

Creative – Handles designing of marketing and printed materials, decorations, and anything to do with making your event look good!

Registration – Your starting lineup to ensure that your attendees' first interaction at the event is a positive one. They're organized with your guest list, efficient at getting everyone checked in, and are pleasant and poised throughout the process.

Venue – The point person and team to oversee all on-site staff, including vendors, security, and parking attendants. They work behind the scenes, coordinate the physical layout of the event, and are critical for a smooth set up and execution.



Sticking to the budget

The first step to staying within your budget is knowing what it is! Start categorizing items and listing things you need and things you want separately. Allocate spending to the must-haves first (such as a required permit), and if you have any funds to spare, add those nice-to-have items to your list. This will help you gauge whether or not you'll need to seriously rethink your spend or acquire additional funds/sponsorships as early as possible.

Here's what basic categories look like in a budget workbook.

List Item	\$ Amount	Budget	Amount Paid	Amount Sponsored	Balance	Notes
Facility						
DJ compensation + gratuity						
Venue rental						
Decorations						
Catering						
A/V equipment and labor						
Security						
Logistics						
Contracts						
Permits						
Insurance						
Marketing and Communications						
Flyer printing and shipping						
Video production						
Photography						
Gifts and Giveaways						
Sponsor thank-you gifts						
Souvenirs						
Prizes						
Total						

6 to 4 months out

By this time, your event committee has had some time to brainstorm and get creative juices flowing. Now it's time to finalize the details of your flight plan and decide on a clear direction.

Strategic steps

- Continue with planning sessions. Comb your project and budget plan to trigger forgotten items.
- Develop a publicity strategy, including marketing and advertising, social media, and public relations. Be sure to create a good reason to attend your event and lead with it.
- Make new friends, followers and connections on social media.
- Begin making creative decisions about the event during your planning sessions.

Logistic steps

- Continue building your contact list.
- Confirm venue, vendors and entertainment.
- Create social media posts to begin building buzz about the event.

One way to get movin' on creative decisions is by effectively naming your event. A title – just a phrase, or even one word – can be extremely vital to achieving success, [neuroscience research](#) suggests. How many other areas are affected by your creative decisions – publicity, menu, staging, décor, speakers, entertainment?

Six months out from your event date might seem like a long time, but remember, you can't move forward in other areas until after you've made many of your creative decisions.



Promoting Your Event

4 months out

Now that you've laid a solid foundation for your event, it's time to start fine-tuning how you're going to promote it. Devise your marketing strategy to target your audience and start creating buzz for the main attraction.

Strategic steps

- Devise a social media campaign to target the audience you want to attract.
- Decide on the marketing materials needed to reach your target demographic, such as printed flyers or digital banners.
- Land on a design theme for all marketing materials that ties into your event.
- Continue to connect with your events committee to troubleshoot any roadblocks that pop up.

Logistic steps

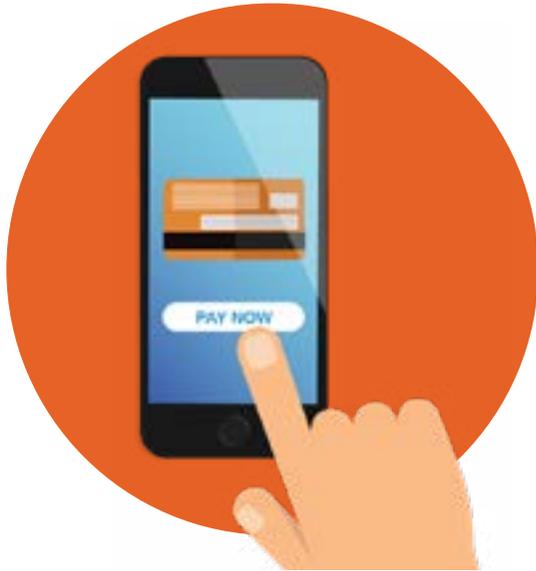
- Finalize speakers or special guests.
- Write copy and create content for your social media accounts.
- Design marketing materials, such as a poster and program.
- Create and launch your event site. Event invitations allow you to track whom you've emailed, their response, as well as funds processed.
- Write and design an email campaign:
 - 1) Save-the-date message.
 - 2) Early-bird invitation. Great for selling discounted tickets in limited supply.
 - 3) Early-bird reminder.
 - 4) Main invitation to RSVP.

- 5) Main invitation reminder. Message to those who have not yet RSVP'd.
- 6) Automatic confirmation email to attendees. Include directions if that's not already on your dedicated event site.



Did you know?

In publicity, reminders are essential. A digital marketing research site [reports](#) the average person receives 121 emails every day. Because emails are so disposable and we're all easily distracted due to multitasking, everyone needs multiple reminders.



3 months out

Marketing materials done – check! Event site is live – check! Start driving traffic, selling tickets, and collecting RSVPs.

Strategic steps

- Update your website with the latest information.
- Allow attendees to register and pay online through your event site.
- Go through your entire to-do list to keep checking off items and tracking due dates.

Logistic steps

- Recruit volunteers and other participants.
- Touch base with your venue and vendors.
- Send main invitation.



2 months out

Continue to get the word out.

Strategic steps

- Ramp up social media engagement.
- Publicity: Engage with other media outlets such as radio, news, public television, and cross-interest websites. Issue a press release if needed.

Logistic steps

- Send main invitation reminder to those who haven't RSVP'd yet.

You can use [Smart Lists](#) to schedule (set and forget it!) an email reminder to go out to everyone who hasn't RSVP'd yet.



1 month out

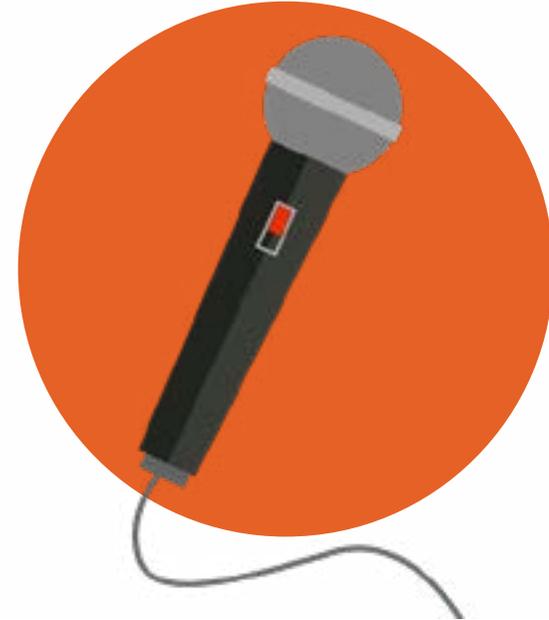
Let the countdown begin!

Strategic steps

- Continue your social media campaign and launch any promotional countdown you've planned.

Logistic steps

- Re-send email invitation to those who haven't RSVP'd yet.
- Finalize your day-of agenda.
- Print and place posters and fliers.



2 weeks out

Finally - it's time to finalize everything from the headcount to presenters.

Strategic steps

- Intensify your publicity and social media campaigns. Promote your event hashtags and tags.

Logistic steps

- Send out reminder email about RSVP deadline to those who haven't RSVP'd yet.
- Finalize headcount, menu, and seating.
- Finalize speeches and speaker presentations.
- Print and deliver materials like programs, handouts, and lanyards.

1 week out

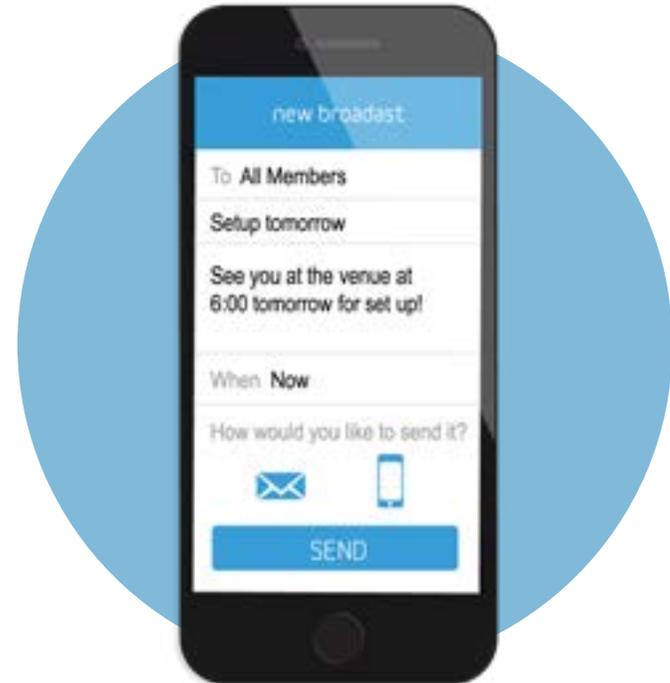
If you've planned accordingly thus far, the week leading up to your event shouldn't be one of panic, chaos, and sleepless nights. Ideally, you'll be able to complete a site walkthrough and meet with your entire team.

Strategic steps

- Iron out any wrinkles in the plan. Consult with your planning committee regarding any outstanding to-do list items.
- Set expectations. Talk to your on-site team (everyone from those doing registration to the security detail) about who your guests are and how they should be treated.
- Alleviate registration "rush hour." Offer pre-event registration leading up to the event if possible.

Logistic steps

- Conduct a dry run or technical walkthrough.
- Confirm volunteer or vendor scheduling.
- Remind your team. Use [Broadcast](#) to send or schedule short announcements or reminders via email and text message.
- Test all audio/visual equipment.
- Schedule any day-of social posts in advance.
- Circulate your events [photo album](#). Enable automatic upload via email, and let guests know they can upload their own photos.



The Event

On the day of the event, it's easy to get caught up with all the behind-the-scenes details. You and your team should appear energetic (not frazzled) and ready to socialize with guests. Don't forget to enjoy what you've planned for months in advance!

Strategic steps

- Have a back-up plan (and supplies) ready to go. An extra power strip always comes in handy.
- Circulate the event space. Check in with key task managers and socialize with attendees. Make any adjustments and have a plan to communicate any changes if necessary.

Logistic steps

- Follow the plan. Print out an up-to-the minute schedule. Have your team arrive at the scheduled time and stay on course.
- Conduct on-site registration. Registration staff should have your full RSVP list and access to record any offline, last-minute RSVPs if needed.
- Supplement social posts with real-time posts. Encourage guests to use your dedicated hashtags and tags.
- Upload event images to your photo album. Encourage guests to do the same by emailing images for automatic upload.



Follow-up

Strategic steps

- Send surveys to gather feedback for improvements for your next event.
- Conduct a post-event evaluation and review [event reporting](#). You can [copy your event site](#) to reuse it for the next annual event.

Logistic steps

- Send personalized thank-you emails. Thank your team, and thank your attendees. Include pictures from the event to show its impact.





Ready to launch your next event? We're here to guide you in-platform to simplify the process. Log in to your club membership portal to get started.

[GET STARTED](#)