

Event Checklist

Name _____

Date _____

Budget _____

90 Days Out	Week Of
Confirm Location is booked for date & time	Text blast to invite list
Confirm deposits/costs	Confirm final headcount with venue
Verify any partners/sponsors are set with date, time & needs	Email partners/sponsors with headcount
60 Days Out	2-3 Days Prior
Check with Loan Officer about the topic	Updated headcount to venue
Create flyer	Handouts / Sign-In Sheets / Surveys prepared in folder with all marketing materials
Any misc. marketing needs/materials are scheduled for production i.e. "swag"	
3 Weeks Prior	Day Of
Order food/drinks for event	Text blast to RSVP's " Look forward to seeing you"
Send out e-mail blast/invitation	Handouts / Sheets / Surveys packed
Personally call invites	Social Media posts/pics/live feeds
2 Weeks Prior	Next Day/Week/Follow Up
Start RSVP List	Review surveys with speaker
Prepare topic material	Add to 10-week follow up/CRM
Advertise on social media	Send Thank You cards
Send out e-mail blast/invitation	