

# Client Event Planning Checklist

## Before the Event

- Determine a clear goal.** This will guide you in choosing the best type of event to host and which clients and partners to invite.
- Choose your event type.** Take a thoughtful approach and select the kind of event that's best suited to your target audience and goal. Consider the time, place, activity level, and dress code.
- Assign an event point person.** This person will be accountable for planning and managing the event, ensuring that it stays on track and achieves the intended goal.
- Determine a budget.** Set a budget you feel comfortable with, and one that promises a reasonable return on investment.
- Consider details like flowers and party favors.** Flowers add a nice touch to the ambiance of any event. Talk to a local florist for ideas on what would best suit your event, venue, and season. A parting gift is also a nice touch, showing your attention to detail and making attendees feel special.
- Determine resources.** Decide what resources you'll need from team members and partners, as well as any third parties like caterers or photographers.
- Align your team.** Make sure everyone knows their role and responsibilities, including what to do before, during, and after the event.
- Be strategic with plus-ones.** If a client has connections you'd like to meet, suggest them by name and encourage your client to bring them along.
- Maximize social media to promote the event.** LinkedIn is a great tool to find prospects and other members of your clients' networks. Use the platform to share the event and generate interest in a broader (but targeted) attendance.\*
- Communicate clearly with invitees.** Ensure your guests know what to expect from the event, including key details that will put them at ease.
- Identify ways to connect with your guests.** You want to maximize the number of high-quality touchpoints you'll have with guests before, during, and after your event. Identifying these in advance and planning as much as possible will help you meet your mark. The ideal number to strive for is 10 positive touchpoints during a single event.
- Keep guests onsite.** Plan something of interest during the event's final half-hour, like a raffle, drawing, or exciting announcement, to keep guests interested in staying until the end.

## During the Event

- Delegate, delegate, delegate.** Assign things like coat check and keeping refreshments flowing to other staff, so you can spend as much time as possible welcoming guests, chatting with them, and getting to know them better.
- Make a toast or share welcoming remarks.** It's a good idea to set the tone for the event with a personal greeting. Remind your guests of what they can expect and how to make the most of the event.
- Take photos or video.** Whether you employ a team member or a professional photographer, capturing the event and sharing photos or videos—in a recap email, on your website, or on approved social media—is a terrific way to show how you engage with your clients. Be sure to get permission from anyone in attendance before you post photos or videos online.
- Execute on your planned touchpoints.** You identified ways to connect with your guests during your planning, so now is the time to execute. Be sure you're balancing your time among guests and not spending too much time with any one person.
- Pay attention to names.** Your guests will give you all sorts of cues during conversation about who and what is important to them. Who do your guests play tennis with? What organizations are they supporting? Who are they visiting during the holidays? Who sits with them on a board of



directors? This is great input for future reference in your follow-up, so be sure to take a few quick breaks throughout the event to take notes of key details.

- ❑ **Set the mood.** Attendees will often follow their host's lead, so don't forget to have fun!

## After the Event

- ❑ **Debrief with your team.** Immediately after the event, meet with your team to discuss what worked and what didn't, and how you can make the next event even better. Everyone will have a slightly different perspective, so listen and pay attention to everyone's feedback.
- ❑ **Follow up.** Build time into your calendar to send an email, note, or thank you gift to attendees. You may want to call those who are close or valuable clients. Ask them their impressions of the event, whether they would enjoy another like it, and any ideas they'd like to share for future events.
- ❑ **Get personal.** If you discussed something specific with a guest, follow up with a personal email or note to reinforce the discussion and let them know how invested you are in what matters most to them.
- ❑ **Share your event photos or videos.** Make sure you share event photos or videos on social media in the immediate hours and days after the event. You want to build on the good feelings attendees carried away from the event and extend the impact of their time with you. If you have permission, tag people, partners, or attending organizations so it shows up in their social media feed, too. Don't forget to use photos and video in your recap email and consider adding them to a photo gallery on your website.
- ❑ **Measure your success.** If you're going to spend the time, money, and effort on a client event, you should know how well it worked. Now is the time to assess everything that went into your event and to attempt to quantify your success as much as possible. Given the goals you set in the planning stage, how did you do? Consider creating your own worksheet with event goals and details, then track your success factors and results from event to event.

\* Please be sure to submit your social media profile for Compliance approval prior to use and consult the Social Media Quick Reference Guide for social media compliance guidelines.