

Your event planning checklist:

Fail to prepare, prepare to fail! Use this comprehensive checklist to help you prepare for any event you might run for your business and ensure nothing gets forgotten. Customise it as required.

Pre-event planning

- Define event objectives Set clear objectives, goals and target audiences for your event.
- Research and analysis Look up relevant marketing dates or inspiration for your event.
Have you run events and promotions before? Make sure you've crunched the data and know your best practices to feed into your plan.
- Set budget Cover all expected event costs, such as decor, staffing, inventory, entertainment, and marketing.
- Confirm date and time Confirm the event date and time, ensuring it doesn't conflict with regular business operations and aligns with customer preferences. Reserve space within your establishment for the event.
- Create an event timeline Develop a detailed timeline of all tasks and deadlines leading up to the event, including setup, day-of logistics, and post-event actions. This is the time to create your marketing and promotion plan too.

Event logistics

- Ordering in advance Get stock ordered, decorations, equipment, and any entertainment within appropriate time of your event.
Coordinate food and beverage offerings for the event, selecting menu items that complement the theme and appeal to attendees preferences.
- Organise staffing Schedule staff, ensuring adequate coverage to deliver exceptional service. Train your team on the event with any event-specific protocols.
- Start promoting Do this at least 6 weeks before your event! Use your marketing plan to promote the event through your website, social media, email newsletters, in-house signage, word-of-mouth referrals, and any other channels to attract your target-audience.
If your event has particular significance, such as fundraising, now can be a good time to reach out to your local press to see if you can get additional promotion for your event, or post-event coverage.



- Manage RSVPs** Track RSVPs and reservations through your booking system or event platform, ensuring accurate guest counts and managing seating arrangements accordingly. Make sure it's part of your booking process to ask attendees if they have any accessibility or dietary requirements. Send confirmation notifications to attendees to keep them excited for your event!
- Prepare event materials** Create menus, signage, or any other items needed.
- Finalise logistics** Confirm vendor contracts, delivery schedules, and event logistics to ensure a seamless execution on the day of the event.
Prepare for the increase in foot traffic by optimising seating arrangements and customer flow.

Customer experience

- Event setup** Decorate the venue or space with a cohesive theme aligned with the promotion or event. Think about music, lighting, and scents.
To increase customer spending on the day, ensure any event-specific promotions are advertised and ready on your POS system.
Provide clear signage about the event location, schedule, and any special offerings. Standard good practices also apply - make sure your space is clean and tidy!
- Pre-event communication** Ensure excellent customer service by training staff on event details and guest interactions. Make sure all staff involved are aware of promotions, expectations, and the goal for the evening.
- Execute the event** The big day! Keep everything running as smooth as possible.

Post-event follow-up

- Guest feedback** Gather feedback from guests in-person or using surveys, social media, and reviews.
- Staff feedback** Talk to staff on the biggest wins and challenges of the event.
- Analysis** Analyse your event data (sales figures, foot traffic, engagement) to measure success. Identify areas for improvement and document lessons learned for future events.
- Follow up** Follow up with attendees through email or social media, sharing event highlights and future promotions.

