No matter your level of event-planning experience, a timeline is a must-do for any and every event. Why?

**It ensures that you:**

- Complete every task associated with planning an event and don’t inadvertently leave anything out.
- Meet all event deadlines, including deadlines for renting seating, **booking a venue**, catering, music, and any other items you need to hire or services you need to contract.
- Stick to your budget within each budget category and for the overall event.
- Coordinate multiple groups of people, requirements, and other elements.
- Collaborate effectively with contractors.
- Have enough time to incorporate additions or changes without negatively impacting the event.
- Have enough time to deal with any problems that arise so they don’t affect the success of the event.

A timeline of every stage and step of planning—in the right order—is essential to getting it right.

**Not sure how to build a timeline? Let us help!** We’ve put together an all-purpose planning template. Use it as-is or modify it to suit your needs and preferences.
6-12 Months Out

☐ Identify event team or committee members + anyone else important to planning process.
☐ Decide what to delegate, then assign roles and tasks to event team members.
  •  **Pro tip:** Work with them to develop their own timelines, so they can keep track of their tasks, particularly if they’re on multiple events or projects at the same time.
☐ Set event date.
☐ Establish event goals and objectives.
☐ Determine budget.
☐ **Choose a venue.**
  •  **Pro tip:** Make sure to both submit and confirm your reservation for the venue.
☐ Define your **target audience** and/or guest list.
☐ Develop invitation lists for invite-only events, including social gatherings and ceremonies to be held as part of larger events.
☐ Develop event program/schedule.
☐ Decide when to start registration and/or ticket sales, if applicable.
☐ Identify suitable keynote speakers, emcees, **entertainment**, plenary speakers, and other appropriate VIPs and special guests; check availability; and book and confirm choices ASAP.
☐ Choose other vendors (ex: caterers, entertainment, equipment, accommodation).
  •  **Pro tip:** Review costs, timelines, and important dates and deadlines as part of selection process.
☐ Plan event promotion campaign and associated advertising and marketing.
  •  Determine whether marketing is done in-house or contracted out.
  •  Review costs, timelines, and important dates and deadlines.
  •  Discuss options for press coverage, if applicable.
☐ Develop ideas for event programs/invitations and award/gift items.
  •  Contract a designer or use an in-house design team.
  •  Investigate costs and deadlines as part of selection process.
☐ Review key decisions with event team or committee and any other decision-makers.
3-6 Months Out

☐ Send save-the-date notifications, if applicable.
☐ Finalize vendors.
   • Check options for vendors that haven’t already been arranged (ex: florists, photographer or videographer, non-VIP entertainers).
   • Book and confirm outstanding vendors.
   • Confirm designs with florist.
   • Confirm accommodation needs with appropriate vendors. Check deadline for releasing unneeded rooms.
☐ Confirm all event VIPs, speakers, and special guests.
   • Gather biographical details for website/program entries, where applicable.
   • For speakers and presenters, confirm AV/equipment/other requirements.
☐ Get final approval for necessary design items (ex: invitations and programs, printed marketing materials, award/gift items, place cards/name badges).
☐ Review venue’s safety and evacuation protocols.

3 Months Out

☐ List any supplies needed for the event that aren’t supplied by contractors/vendors.
   • Place and confirm orders for needed supplies.
☐ Finalize guest list for invitation-only events.
☐ Finalize and place orders for design items (ex: invitations, award/gift items, place cards/name badges).
☐ Collate and confirm event program and schedule (ex: speaker/presentation order, topic confirmation, length of presentation, AV requirements).
☐ Contact VIPs to determine accommodation needs.
   • Book and confirm VIP accommodation.
☐ Confirm catering menus, including special dietary requirements.
☐ Determine security needs.
   • Book and confirm security service.
2 Months Out

☐ Assemble items for mail-out.
   - Address and assemble invitations.
   - Mail items.
☐ Send out digital invitations, where applicable.
☐ Approve final copy for programs and other printed materials.
☐ Do a venue walkthrough with applicable personnel (ex: facility/venue manager, vendors, tech/AV services).
   - Discuss tech/AV setups.
   - Determine any need for directional/other signage.

Month of the Event

☐ Finalize guest list once RSVPs received.
☐ Finalize VIP/guest accommodation.
   - Release unneeded rooms before hotel’s deadline, if applicable. (*Pro tip: Consider retaining a few to accommodate last-minute RSVPs.*)
☐ Send remaining printed items to printer, no later than three weeks before the event or another date determined by printer (ex: event programs, place cards/name badges, printed marketing materials, directional/other signage for venue).
☐ Send setup requests (ex: AV setup) to appropriate venue parties.
☐ Arrange press/PR events (ex: Send out press releases to appropriate news agents.).
☐ Confirm photographer/videographer.
   - *Pro tip:* Write and share list of photo opportunities.
☐ Create seating charts for sit-down events.
☐ Develop scripts needed for speakers/emcees at the event and distribute to appropriate people.
☐ Develop cue sheets for AV team, if applicable.
☐ Book transportation for speakers and VIPs.
☐ Confirm fees/honorariums for speakers and presenters.
   - Send payment requests to admin/finance department, as applicable.
☐ Set up on-site rehearsal/run-through, if required.
☐ Send final email/mailout to guests/attendees, including: agenda/program; suggested attire; map and directions; parking instructions, where applicable.
☐ Determine roles and responsibilities for on-site team on event day.
1 Week Out

- Confirm transportation for speakers, VIPs, special guests.
- Make necessary revisions to accommodate late RSVPs.
- Final caterer confirmation no later than 48 hours before the event, or as determined by caterer.
  - Pro tip: Provide updated headcount according to latest RSVP numbers.
- Final confirmation for other vendors (ex: security, entertainment, equipment, flowers, etc.).
  - Pro tip: No later than 48 hours before the event, or as determined by vendor
- Review roles and responsibilities for on-site team on event day.
- Finalize transportation for speakers and VIPs.
- Email or print media/remarks release forms for speakers and VIPs to sign.
- Distribute remaining PR items (es: press releases, guest lists, VIP appearances).

Day of Event

- Arrive at event venue early for setup.
  - Check AV.tech setups.
  - Place directional/instructional signage, place cards, badges, etc.
- Bring required registration materials (ex: guest list, name badges, card readers).
- Run event walkthrough with event staff.
  - Pro tip: Run through roles and responsibilities, as necessary; review locations of restrooms, elevators, stairs, and accessibility points; review evacuation procedures, including fire exit).
- Have extra copies on hand of planning materials (ex: schedules, programs, agendas, cue sheets, press releases).
- Check in with vendors, as needed, providing last-minute instructions or requests.

You don’t have to do it alone. The right event-planning company can establish the right timeline for you & execute it, from start to finish.