



YOUR EVENT PLANNING TIMELINE

ProGlobalEvents

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.

YOUR EVENT **ProGlobalEvents** PLANNING TIMELINE

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.

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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.

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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.

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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.

