Event Brief Template:
The All-Encompassing Event Checklist

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Let's face it, planning an event can be taxing and time consuming. It's easy to miscalculate deadlines or experience burnout after hours of tedious planning.

When it comes to planning a memorable event, the last thing you want is to be surprised. Imagine if you could establish a comprehensive framework that drives you and your team from start to finish, leaving no stone unturned.

This event brief is designed to guide you and your team in creating an event that leaves no box unchecked. Customize this template to fit your next virtual, hybrid, or in-person event.

Event Brief	
Laying the Foundation	
Description: All event professionals know that creating a showstopping event requires a team of organized experts with the ability to see the event from both a creative and logistic standpoint. While the details may be daunting at times, the smallest mistake could hinder the event's progression. This section encapsulates the most essential information about your event so everyone has the same understanding, leaving little room for miscommunication.	
Examples Include:	
● **Event:** Event Name	● **Event Description:** Brief introduction of event
● **Contact Coordinator**: Name, Phone Number, Email	● **Day(s)/Date(s)/Time(s):** Timing of event
● **Location:** Venue location	● **Event Type:** Virtual, hybrid, or in-person
● **Event Size:** Estimated attendee size	● **Event Website/Registration Link:** Point of contact/login information

Key Resources and Materials

Description:
Juggling the many facets of planning an event is difficult, especially when your team is working in different directions. It's important to have a hub of resources for you and your team to fall back on for reference. This should include a comprehensive folder of documents and spreadsheets that all team members have access to. Upon discretion, change the permission settings of shared documents to viewing or editing. These materials will help relieve questions/concerns that may arise.

Examples Include:

• **Client Contract**	• **Event Management Tracker**
• **Budget spreadsheet**	• **Stakeholder Analysis**
• **The Run Sheet (Event Production Schedule)**	• **RFPs**
• **Event Timeline**	• **Marketing Timeline**

Objective

Description:
Event objectives essentially serve as a road map to achieving a specific goal or result. Your objectives should be clear and concise in order to produce tangible results. You may have heard of SMART objectives. SMART objectives are Specific, Measurable, Achievable, Relevant, and Time-Bound. Keep this framework in mind when considering the objectives of your event. Knowing the objective or purpose of your event will help leverage the outcome of your event.

Consider the following:

• **Reinforce brand awareness**	• **Improve internal stakeholder relationships**
• **Foster new sponsorships to fund event**	• **Boost product awareness**
• **Identify and incorporate experienced speakers who will drive engagement**	• **Reduce energy usage and minimize waste**
• **Generate potential prospects**	• **Build customer retention**

Goal

Description:
Your event goals should stem from your event objectives. Think of each goal as a quantitative measurement that assesses or gauges the outcome of an objective. It's easy to misinterpret the differences between the two, but these subtle nuances make all the difference in accomplishing effective and measurable outcomes. Ideally your event will reach each goal; consequently propelling growth in future events.

Examples Include:

- X% increase in ticket sales
- Increase in social media/website traffic by Y%
- Ratio increase in registration among old and new attendees by X%
- Increase in pipeline or sales revenue by Y%
- X% waste diversion rate
- Increase sponsorships by X%
- Y% turnout compared to last year
- X% post-show engagement from attendees

Marketing

Description:
Marketing is a loose term that embodies a plethora of strategies, communication styles, research, advertising, and more. This section highlights general components to consider when developing your pre, during, and post marketing plan. In the sections below, we will take a deeper dive into the key marketing strategies to focus on for your event. Make sure all marketing content is ready to go with timelines before the go-live dates.

Consider the following:

- Launch landing/registration page
- Promote event on social media
- Event hashtag
- Invites, reminders, follow-ups
- Event press releases
- Affiliate marketing
- Create templates for sponsors and exhibitors
- Social media profile/group for attendees to join prior to event

Audience/Target Market

Description:
Understanding your audience is a key step in executing a successful event. The idea sounds rather straightforward, but it's easy to miss the mark if you're not careful. You can't have an event without an audience, so make sure to hone in on the unique needs, desires, and values of your audience. Tailor your event's message to your target audience for a better ROI and leverage your reach by networking and connecting with your audience through marketing methods such as blog posts, pre-event surveys, and more.

Examples Include:

● **Know your audience's budget**	● **Create a buyer persona profile**
● **Demographics**	● **Age group**
● **Identify your audience's problems**	● **Look at your competition**
● **Online behavior**	● **Key trends**

Event Website

Description:
An event website serves as the main source of information for attendees and is the first place they will look for key details about your event. Not only will an event website help create buzz around the event, but it also helps build a solid reputation. When building the website, remember functionality and easy navigation is essential. No one wants to use a site that's too technical. Include easy access ticketing and payment methods for attendees. Integrate the site with your CRM marketing automations such as Zoho, Hubspot, Salesforce, etc. Make sure your site stays cohesive with your event branding. The color theme, logos, imagery and design should all be consistent. If done effectively, an event website will likely broaden your audience spectrum and provide insightful event analytics.

Consider the following:

● **Create a landing page**	● **FAQ page**
● **Upload the agenda**	● **Add a countdown timer**
● **Social media links**	● **Upload sponsored ads and banners**
● **Showcase exhibitors, sponsors, speakers**	● **Live chat support**

Networking and Engagement

Description:
Networking is a great way to build longevity in customer relationships. Pre and post show engagement is a general rule of thumb that should be followed by all event planners. As we enter a post-Covid world, hybrid and virtual events are becoming more prevalent than ever. It's necessary to implement refreshing and innovative methods to maintain engagement across the board. Create 1-1 scheduled meeting options for more personable interactions as well as networking lounges that connect in-person attendees with virtual participants.

Consider the following:

● **Enable polls and live chat**	● **Send post event survey**
● **Plan and schedule posts for socials**	● **Ice breaker activities**
● **Contests/prizes**	● **Name badges**
● **Send event reminder emails**	● **Send push notifications**

Budget

Description:
We all know the feeling of buyer's remorse or post-purchase regret. Don't let that be the case when it comes to budgeting your event. It is vital to create a comprehensive budget to ensure all event expenses are allocated correctly. For example, the last thing you want is to underestimate the cost of food & beverage, leaving little wiggle room for A/V technology. Use this section as a stockpile of all expenses, revenue streams, and profit. Make sure this resource is easily accessible by your team so everyone is on the same page.

Examples Include:

● **Item name:** Should be clear and concise.	● **Total expenses**
● **Description:** Outline of essential details needed for teammates	● **Total income**
● **Actual cost**	● **Total profit (or loss)**
● **Estimated cost**	● **Notes:** Include links, questions, key information for other teammates or collaborators

Team Roles

Description:
It's common knowledge that one person can't and shouldn't be responsible for an extensive amount of responsibilities, especially when planning an event. Leaders should delegate tasks to team members based on their specific roles and play into each other's strengths to create a higher level of productivity. This will not only create a more balanced and stable work flow but also create more trust and satisfaction from your team members. When employees are given higher value duties and authority it often boosts overall morale and credibility. Use this section to update and compartmentalize all team, staff, and stakeholders on provisional responsibilities and tasks.

Common examples include:

● **On-site staff:** producers, emcees, hosts, event manager	● **Food vendor:** catering, wait staff
● **Virtual staff:** moderators, speakers. emcees	● **Setup/breakdown staff**
● **Hybrid staff:** combine a list of in-person and virtual staffing needs	● **Concierge staff:** Help desk, directional staff, greeters
● **A/V technical staff:** live streaming & tech support	● **Sponsors**

Agenda

Description:
To keep stress at bay, incorporate an agenda of your event for the viewing of team members, stakeholders, and participants. The absence of an organized outline may be grounds for a tumultuous crowd and no one wants that. The structure of your agenda should include traditional components like start and end times, keynote speakers, breakout sessions, and more. The included content should be clear and concise so everyone stays on track, resulting in a successful and timely event.

Common examples include:

● **Start and end times**	● **Welcome and introduction**
● **Keynote speaker(s)**	● **Discussion topics**
● **Breakout sessions**	● **Registration**
● **Lunch break**	● **Networking**

Theme

Description:
Identifying the concept behind your big picture event can make or break the integrity and ambiance felt by your audience. The theme should reflect the objectives or framework you established in the initial steps of logistical planning. A carefully crafted theme embodies the message you are trying to convey while establishing a playful, upbeat tone. Imagine you switch places with your attendee. What ideas or components would create a memorable and satisfied experience for you?

Consider the following:

● **Tone**	● **Trends**
● **Branding**	● **Experiential elements**
● **Theme description**	● **Food and beverage**
● **Cohesive color palette**	● **A/V design**

Logistics

Description:
Logistics determine the overall experience and execution of your event. They encapsulate all of the pivotal stepping stones that in turn, create a smooth and successful event. This process encompasses everything from the technical side of planning, down to the customer experience. These important factors sequentially improve the minute details that can easily be overlooked. Use this section to make note of existing logistics and make sure to update the status, as things inevitably change.

Consider the following:

● **Venue:** Capacity, indoor & outdoor space, location, est attendees, etc.	● **Travel:** Hotels, transportation, shuttles, parking, etc.
● **Merchandise:** Swag, giveaways, awards, etc.	● **Customer Service**: Communication, pre and post attendee surveys, engagement
● **Catering:** Meals & beverage, food vouchers, vendors	● **Legal Compliances:** ADA accessibility, client contracts, liability insurance, health department permit, liquor license, etc.
● **Technology:** run-through, a/v check, streaming platforms, production equipment	● **Signage:** Informational kiosks, badge printing, social hashtags, entrance/exit, etc.

A/V Technology

Description:
Audio and visual technology can be one of the most costly expenses of your event so you want to make sure they run as seamlessly as possible. When used correctly, A/V will enhance the ambiance and increase engagement among attendees, especially when it comes to hybrid and virtual events. Gravitate towards devices and equipment that have plug and play functionality, leaving less room for technical errors. Use this section to highlight the audio/visual components you want to consider throughout your event.

Common examples include:

● **Live streaming**	● **In-house sound system**
● **Supportive device bandwidth**	● **Technicians**
● **Equipment/device rentals**	● **Projectors/big screens**
● **Transmitters and receivers**	● **Power source & distribution**

Speaker Sourcing

Description:
Will the speaker I've chosen be able to express the message I want to convey during my event? This is a question you should ask yourself while planning the experiential components in your event. To avoid potential hiccups, it is best practice to begin strategizing your speakers, emcee's, and moderators in the early planning period of your event. Keep in mind that it generally takes months of back end work to solidify a speaker and oftentimes involves a binding contract so make sure to do your research before booking. You don't want to jeopardize your event's integrity, so do your due diligence by hiring someone who will compliment and embellish your event.

Consider the following:

● **List of potential speakers**	● **Credible Q&A:** Host Q&A sessions prior to the event to gain traction.
● **List of confirmed speakers**	● **Offer cutting edge technology:** Give speakers necessary access prior to the event for navigation and preparation purposes.
● **Speaker presentations:** Key material for all team members and stakeholders to have access to	● **Provide access to data:** Give speakers a list of registration data and links, especially for virtual and hybrid events.
● **Practice and rehearsal**	● **Contact a speakers bureau:** a tool to source reliable and professional speakers

Exhibitors, Sponsors, and Partners

Description:
There are so many moving pieces that affect an event's success rate. Keeping exhibitors, sponsors, and partners in the loop is a significant factor of this puzzle piece. It's important to understand the objectives and goals of different exhibitors and sponsors. What is their expected ROI from the event? Have you provided them with plenty of brand exposure? If you understand their positioning, the likelihood of reaching a broader audience and lowering overall costs increases exponentially. Ask yourself the following when soliciting partners for your event: What does my event have to offer this partnership? How does my event benefit from this partnership?

Consider the following:

• **Select affiliate partners**	• **Link to support chat**
• **Share copy of agenda**	• **Allow access to booth furniture, equipment, etc.**
• **Ask for downloadable assets from all partners**	• **Provide promotional toolkits:** Ask them to promote on their social networks to reach a larger audience
• **Share onboarding deck/exhibitor hall map**	• **Curate follow up strategies for post-event engagement with partners**

Health, Safety, and Privacy

Description:
With the pandemic in our rearview mirror, health and safety take on a whole new meaning, especially when it comes to hybrid and in-person events. Now more than ever, there are critical precautions set in place to protect the wellbeing of all those attending live events. The privacy policy of your event should be made clear and communicated with all stakeholders. How will attendee data be shared to exhibitors and sponsors? Where will attendee contact information be stored? What data does the hybrid event platform store? Make sure to share these details to all parties involved.

Consider the following:

• **Implement a COVID safety plan**	• **Safety and cleanliness guidelines**
• **Rapid testing**	• **Develop emergency plan**
• **PPE kits**	• **GDPR compliance**
• **Provide Covid related supplies:** Masks, shields, sanitizer, etc.	• **Cybersecurity plan**

Simplify the complexity of event planning with this free downloadable template.
This customizable checklist makes it easy to compartmentalize all aspects of your event, hassle free.
Don't fall victim to monotonous planning. The **eShow** event brief is designed to simplify.

Key benefits from using this template:
- Helps identify measurable goals and a call to action plan
- Involves all stakeholders in the planning process
- Creates realistic timelines and deadlines to stay on track
- Increases brand awareness and visibility
- Significantly decreases the likelihood of error

Ready to learn more? Let's discuss your ultimate event goals, your productivity workflows, and see where eShow can assist in easing your mind. Our event guru's are trained with efficiency and bottom line in mind. We've got your back. Visit us today.