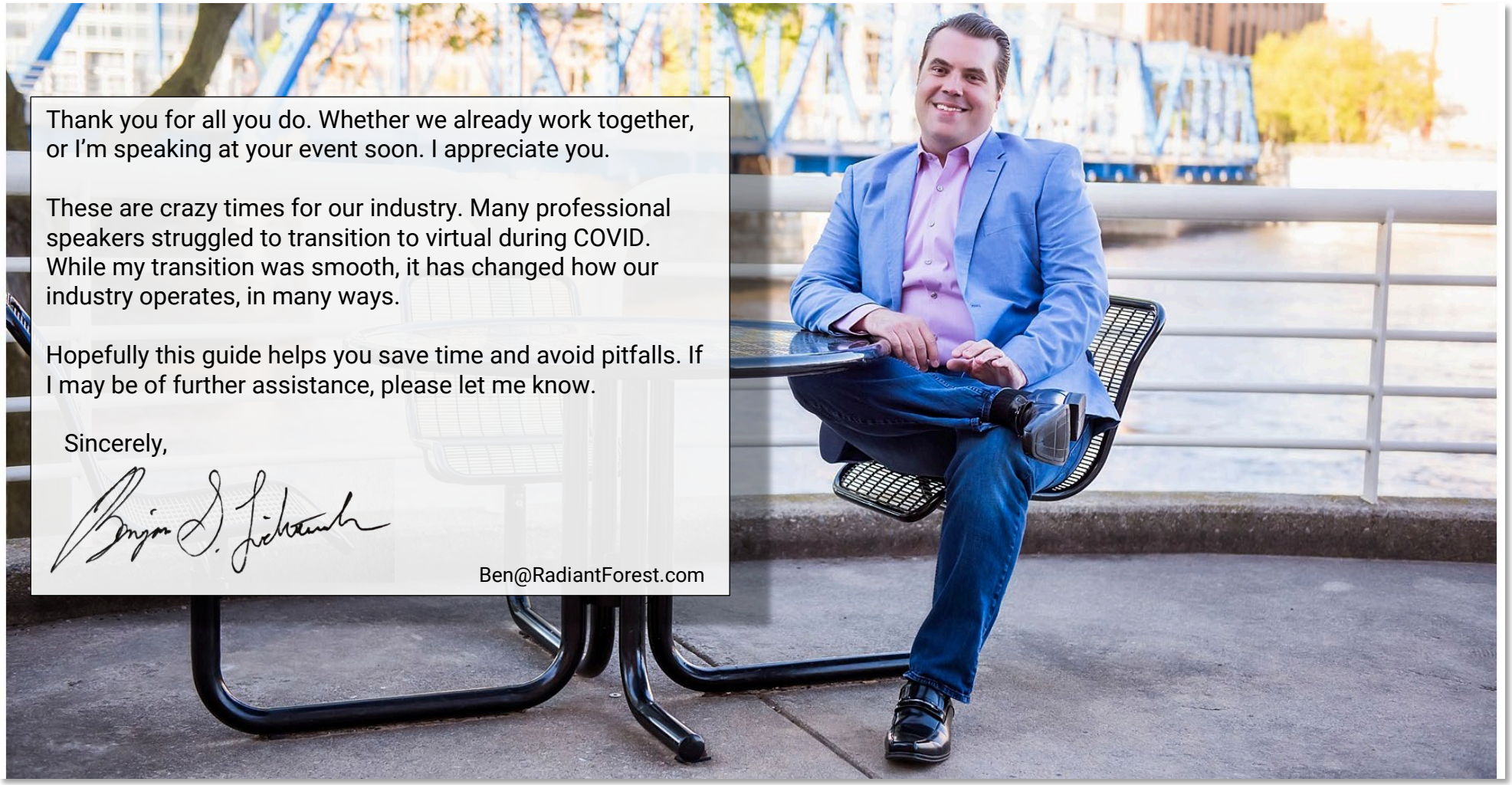
Ultimate Event Planning Checklist

96 Questions for Event Professionals to Ask



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Objective

As an event professional, you may already ask many of these questions. However, from my experience, event planning can be chaotic at times and checklists help minimize that chaos. You may also find a couple new nuggets in the list. If you have feedback or something to add, I'd love to hear from you (Ben@ServantLeadershipSpeaker.com).

Traditional vs. Virtual Events

Traditional events have robust requirements for the geographic location, transportation, venue, hotels, and more. Virtual events, on the other hand, require extensive knowledge of the technical tools, capacities, and systems administration. Hybrid events have even greater requirements of the features in both Traditional and Virtual events.

Hybrid Events

Any event that includes both in person and remote participation is a hybrid event. This could include events that begin with an in-person portion and follow up with virtual portions. However, in this guide, when referring to Hybrid events, we mean truly balanced experiences, whether attendees join in person or remote, at the same time. In other words, it focuses on creating the best possible remote experience, while still delivering an outstanding in person event. Hybrid events allow you to reach more people. It also offers safer options during pandemics or other major public risks.

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Traditional, Virtual, or Hybrid?

If you're considering whether to make your event In Person, Virtual, or Hybrid, consider the following benefits. For each benefit, there is an indicator of which event type is typically better suited for that benefit. If you find a relative balance at the end, budget permits, or you simply want the benefits of both Virtual and In Person, consider a Hybrid event.

Benefit	Description	In Person	Virtual
Memorable	Attendees should have a fond memory of your organization and the event, for many years.	+	-
Networking	Attendees should build strong relationships with other attendees, during the event.	+	-
Experience	Attendees should have a unique experience at the event.	+	-
Attention	Attendees should be focused on the event only with little or no distraction.	+	-
Marketing Assets	Your organization should capture media it plans to use for future marketing and promotions.	+	-
Exclusivity	You want your attendees to feel special for being invited or participating.	+	-
Cost Control	Your organization has a very tight budget.	-	+
Travel Constraints	Your attendees are limited in their ability or willingness to travel for the event.	-	+
Technicality	Your content is very technical (or tactical) in nature, requiring notes / screen shots of delivery.	-	+
Participant Tracking	Your organization wants to track who (and how many) attend each aspect of the event.	-	+
Reach	Your organization wants to reach as many people as possible with the event.	-	+
Flexibility	Attendees need flexibility on when and where they participate in the event.	-	+

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Venue Checklist

1. **Accessibility (General)** – Is the venue highly and easily accessible from car, planes, trains, local hotels, and more?
2. **Accessibility (ADA)** – Most venues require this by code, but consider your attendees with special physical access needs. Is the venue suitable for those attendees?
3. **Acoustics** – How does the venue sound during presentations? Try to visit during another live event to properly assess matters like hearing other events through walls, echo issues, and other concerns you may not hear until too late.
4. **Adequate Parking Space** – Consider your audience. If most are withing driving distance you may need more parking than if most are staying at the venue or within walking distance.
5. **Adequate Seating Space** - Is there enough room to host the expected in person attendance? Is there sufficient room for the cameras, streaming equipment, and usual AV resources?
6. **Ambience** – What does it look and feel like? If you have an ultra-modern brand and the ambience is old-school Victorian, there may be better options.
7. **AV On Premise** – What are the audio / visual capabilities on premise for the in person presentations? Does the facility provide the personnel to operate them?
8. **Bandwidth** – Livestreaming video, often multiple sessions in parallel, requires large bandwidth when done right. Does your venue or streaming contractor have adequate bandwidth to cover the peak of streaming and / or attendee Wi-Fi, if on the same channel?
9. **Catering Flexibility** – If attendance varies greatly, what options do you have to adjust catering costs and expectations?
10. **Cleanliness** – Is the facility clean and well maintained? Try to spot-check when they're not expecting you or during another event.
11. **Contract Terms** – Make sure it is as flexible as possible. Especially consider what happens in a pandemic, lockdown, or "Acts of God"? This goes for all contracts, of course, not only the venue.
12. **Digital Signage** – Last-minute changes are more common with hybrid events. Does the venue include digital room and hall signage for on-the-fly redirections of foot traffic?
13. **Green (Screen) Room** – Is there a studio space for chroma key / green screen recordings with your speakers before, during, or after talks?
14. **Insurance** – What does their insurance cover? What are you expected to cover?
15. **Internet Access Latency** – In addition to pure bandwidth, make sure your planned internet access channel has very low latency (essentially, speed).
16. **Kitchen Access** – Does the venue provide the catering? If not, will your caterers have access to adequate kitchen space?
17. **Physical Space Flexibility** – If the number of physical attendees changes abruptly, can the physical space adjust so you don't have either large vacant spaces or overcrowded rooms?
18. **Redundant Electrical** – Does the venue have backup power generators in case of power failure?
19. **Redundant Internet** – Does the venue have a redundant internet service provider or backup plan if their ISP fails?
20. **Seasonal Weather** – Booking a venue in Alaska in December or in the Caribbean in August (hurricane season) comes with some added risk.
21. **Setup Expectations** – Will their staff handle the setup and tear down of the chairs, tables, etc.?
22. **Virtual Host Room** – Many hybrid and virtual events are opting for dedicated hosts, to run the online experience. Is there a space for these hosts to manage and lead online engagement?

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Digital Platform Checklist

23. **Livestream** – The ability to livestream the event is foundational. How good are they at this capability?
24. **Strong References** –This is not a time to try an untested solution. How good are their customer references and online reviews?
25. **Redundancy** – What happens if the platform fails?
26. **Support Prioritization** – Will you be their biggest live event the days of your event? If not, how do they prioritize support?
27. **Administrative Tooling** – How easy is the platform to operate for your employees and volunteers?
28. **Backups** – How does the platform handle backups of your configuration, content, and other assets?
29. **Training Sessions** – Does the provider offer free, live, in person, or pre-recorded training for your team?
30. **Branding** – Can you apply your own colors, styles, domain name, and such?
31. **Automation** – Once your data is loaded and schedules provided, how much of the execution is automated?
32. **Simultaneous Sessions** – Does their solution support multiple speakers, in a single session, even from different locations?
33. **Automated Subtitles** – Can they deliver subtitles during livestream and pre-recorded videos?
34. **Advertising** – How does the hosting tool enable advertising for sponsors, exhibitors, and your organization?
35. **Lobbies** – What type of virtual lobbies does the platform offer for remote attendees to engage?
36. **Attendee Profiles** – How does the platform handle attendee profile creation, sharing, and privacy settings?
37. **Chatting Features** – Does the solution include robust text, video, and voice chat features?
38. **Networking Rooms** – Can attendees meet and greet each other in rooms labeled by specific topics?
39. **Polling** – Are you able to conduct polls, in real-time, before, and after the event? How does it integrate with the livestream?
40. **Surveys** – Similar to polling, can you run surveys before, during, and after the event?
41. **Push Notifications** – Through the website, livestream, or mobile apps, can you push notifications to attendees?
42. **Main Hall** – Is there a clearly identified “main hall” that is easy to access from anywhere on the site or streams?
43. **Breakout Rooms** – Can attendees choose from multiple breakout rooms that are clearly labeled and easy to switch between?
44. **Hallway Interactions** – Is there a way for attendees to meet and greet between sessions that replicates the hallway chat in person?
45. **Exhibit Hall** – Can virtual attendees easily find and go between exhibitors?
46. **Analytics** – Can your team access real time reporting, user participation metrics, feature usage information, poll results, and more?
47. **Social Integration** – How does the platform enable, promote, and track social platform integrations and sharing activities?
48. **CRM Integration** – Does the platform integrate with Customer Relationship Management or Membership Management platform?
49. **Single Sign on / Social Sign On** – Can attendees sign on using their existing social platform credentials?
50. **Gamification** – What features exist for scoring points, challenging each other to competitions and similar gamification options?
51. **Sponsorship Tiers** – Can you offer different tiers of sponsorship and easily control what each includes on the platform?
52. **Lead Management** – How does the platform capture and share lead data for your sponsors and exhibitors?
53. **Bandwidth Accommodation** – Can attendees switch between high resolution, low resolution, and audio only?
54. **Pre-Recorded Failover –** If the live stream fails, can the system fail over to a pre-recorded video of each session?
55. **On-Site Virtual Engagement** – Can you run virtual engagement stands so those on-site can easily engage with those remote?
56. **Virtual Attendee Display** – Can you play virtual attendee streaming videos on-site at the event?

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57. **Q&A Feed to Live Speakers** – Can on-site speakers easily receive questions from both virtual and present attendees?
58. **Participation Tiers** – Can you easily adapt virtual attendee experience by ticket price / category?
59. **ADA Compliance** – You have obligations to Americans with Disabilities Act & similar laws in over 181 countries. Is the platform compliant?
60. **Mobile Support** – Does the solution adjust to the ideal user experience regardless of the device your attendees use?
61. **Content Storage** – After the event, where is your content stored and for how long?
62. **Content Access After Event** – Does the platform offer attendees and organizers access to your content after the event?
63. **Support Options** – Does the provider offer phone support, 24/7 hours, and / or live, in-person support for your event?

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On-Site Speaker Selection Checklist

64. **Great Speaker** – Is the person a great speaker?
65. **Preparation Process** – How does the speaker prepare for the event and how do they engage your organization in that process?
66. **Message Alignment** – How does the speaker tailor their message to your organization and attendees?
67. **Audience Engagement** – How does the speaker engage the on-site audience without feeling forced?
68. **Industry Experience** – Does the speaker have experience in your industry or working with your attendees and their roles?
69. **NSA Membership** – Are they members of the National Speakers Association (US) or similar association in your region?
70. **Certifications** – Does the speaker possess any professional speaking certifications?
71. **Prerecorded Support** – Does the speaker offer a complete, pre-recorded session, for fail over in case of a livestream failure?
72. **Networking After Event** – Is the speaker willing to participate in networking rooms or sessions during or after the event?
73. **Separate Virtual Session** – Will the speaker hold a separate session for Q&A or other focus, specific to online attendees?
74. **Virtual Engagement** – Is the speaker comfortable integrating polling, social media, and chat sessions from the stage?
75. **Event Promotion** – Is the speaker willing to the promote the event online before, during, and after the event?
76. **Extended Stay** – Will the speaker arrive early and / or stay late to accommodate greater flexibility?
77. **Disaster Planning** – In the case of pandemics, bad weather, or other “acts of God”, does the speaker have backup plans?

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Virtual Speaker Selection Checklist

78. **Great Speaker** – Is the person a great speaker?
79. **Preparation Process** – How does the speaker prepare for the event and how do they engage your organization in that process?
80. **Message Alignment** – How does the speaker tailor their message to your organization and attendees?
81. **Audience Engagement** – How does the speaker engage the on-site audience without feeling forced?
82. **Industry Experience** – Does the speaker have experience in your industry or working with your attendees and their roles?
83. **NSA Membership** – Are they members of the National Speakers Association (US) or similar association in your region?
84. **Virtual Experience** – Has the speaker presented virtually, on a regular basis, or are they new to this channel?
85. **Interaction Style** – How does the speaker interact over a digital and livestream channel?
86. **Live and Virtual Presentations** – Is the speaker willing to conduct both live, in person, and virtual presentations?
87. **Prerecorded Session -** Does the speaker offer a complete, pre-recorded session, for fail over in case of a livestream failure?
88. **Studio Quality** – Does the speaker have the proper lighting, sound proofing, space away from traffic or external noise?
89. **Chroma Key Quality** – Many speakers have poor quality green screens. Does this speaker have a professional grade setup?
90. **Camera Framing** – How big is their camera framing? Does it show Full body, 3/4 Body, 1/2, or only a “talking head”?
91. **Redundant Internet** – Does the speaker have redundant internet service so if one fails, they have a backup?
92. **Redundant Power** – Does the speaker have redundant power, so if one fails, they have a backup?
93. **Virtual Certification** – Does the speaker possess a Virtual Speaker certification?
94. **Other Certifications** – Does the speaker possess any other professional speaking certifications?
95. **Producer** – Does the speaker plan for someone to manage the chat dialog, polling and other technologies?
96. **Event Promotion** – With greater opportunities for a virtual audience, is the speaker willing to the promote the event online?

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About Ben Lichtenwalner

Author, speaker, and consultant, Ben Lichtenwalner brings a fresh perspective to the message of leadership for contemporary professionals. His energy and enthusiasm for authentic leaders and their potential to change organizations, is contagious. He brings humor and sincerity that has audiences engaged and committed.

Ben also brings insightful and meaningful content that includes:

- Messages tailored to your audience
- Specific actions for leaders to take immediately after the session
- Distilling hundreds of leadership principles to 7 memorable actions

His most frequently sought topics include:

- Servant Leadership
- eCommerce Leadership
- Information Technology Leadership
- 21st Century Leadership
- Executive Presence in a Digital World

If you're interested in Ben for your meeting or event, check his availability.

Document Revision History

1.0. Original Guide. Focused exclusively on virtual events, early in the COVID19 Pandemic
1.1. Revised to include Hybrid events as we began returning to some in person meetings
2.0. General update and revised to include more questions for Traditional events
2.1. Added the In Person vs. Virtual vs. Hybrid considerations section

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