

# An Event Services Checklist



It is useful to have a checklist to use as an aide-memoire, both for producing a comprehensive, clear and accurate brief for an agency and for running an event. Please find an example of one below



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### An Event Services Checklist

*Title of the Event*

#### Objectives

*Type of Event:* Conference, Congress, Symposium, Advisory Board, Investigator Meeting, Virtual Conference, Educational, Training, Internal Meeting, Incentive, Product Launch, Corporate Hospitality, Party.

*Objectives for the event:* Communication, discussion, educate, networking, motivate, reward.

*Key Messages:* What key messages would you like those attending the event to walk away with?

*Other Activities:* How does it fit within the campaign? Other activities? How will it be measured?

#### Internal Procedures

*Agency Service Required:* Venue Search & Negotiation, Creative work, Design & Build, AV Production, Delegate Handling, Event-related Travel, Motivation, Corporate Hospitality, Virtual Conferencing

*Procurement Mandates:* Initial Estimated Budget. Objectives and Deliverables of the event. Do you need to use Agencies? Can you use the Preferred supplier list? If not, do you need to issue a RFI or RFQ? Timescales involved.

*Production of Brief:* Internal client to draft the brief, brief issued to agencies, review meetings diarised, date of deliveries agreed, and sign off of deliverables.

*Procurement Process:* Contracts signed, Budget in place, Purchase Order process, Sign off of budgets, Invoicing process, Reconciliation, Measurement and ROI.

## Program Overview

<b>Specifics</b> <i>Dates:</i> Ideal dates, secondary dates, are dates fixed?, over a weekend or mid-week? any public holidays? <i>Destination:</i> Preferred destinations, destination type (city centre, country retreat, golf, beach etc.), destinations to avoid, no go areas, destinations used previously, max. fly-ing time., flight access	<b>Attendees</b> <i>No. of Attendees:</i> Delegates, partners, speakers, observers, administrators, transcribers, events team, external agencies. <i>Attendee Profile:</i> Male/female ratio, age range, sophis-tication, expectations, special requirements
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Day	1	2	3	4	5	6	7
<i>Breakfast</i> (Coffee prior to meeting / upon arrival, bacon sandwich-es)							
<i>Morning Meeting</i> (Timings, numbers, style, syndicate rooms)							
<i>Morning Activities</i> (Icebreakers, teambuilding, sporting, sightseeing, at leisure)							
<i>Morning Tea / Coffee</i> (In foyer area or separate room)							
<i>Lunch</i> (Stand up, sit down, in restaurant, in private)							
<i>Afternoon Meeting</i> (Timings, numbers, style, syndicate rooms)							
<i>Afternoon Activities</i> (Energizers, teambuilding, sporting, sightseeing, at leisure)							
<i>Afternoon Tea</i> (In foyer area or separate room)							
<i>Cocktails</i> (Open bar or on consumption, inc. champagne, canapés)							
<i>Dinner</i> (Formal, informal, buffet, private room, restaurant, on/off site – transfer time from hotel)							
<i>Entertainment/activity</i> (Speaker at dinner, quiz, string quartet, band, disco)							
<i>Accommodation</i> (Number of bedrooms, single / twin, upgrades for VIPs)							

### Event Details

<p><b>Flights</b>  <i>Origin:</i> number of people, from where, specific departure / arrival times?  <i>General</i> – Direct or indirect, individual or group (more than 10), class of travel (business class over a certain journey time?), max. flying time, preferred airlines, charter, restrictions on numbers per flight, access to VIP airport lounge  <i>Note:</i> Anyone staying additional nights due to flight access?</p>	<p><b>Accommodation</b>  <i>Type of Hotel:</i> 3-star, 4-star, 5-star, city centre, airport, country house, split between hotels? Specific hotels requested, chains to avoid  <i>Type of Rate:</i> Room only, B&amp;B, DB&amp;B (dinner, bed &amp; breakfast), day delegate, 24 hour delegate,  <i>Room Type:</i> Single, double for single occupancy, twin, double, suites for VIPs, complimentary upgrades, run of house or with view?  <i>General:</i> Group entrance, check in procedure, portorage, meal times, opening/closing times of bar &amp; other outlets, bedrooms pre/post event</p>
<p><b>Meeting Requirements</b>  <i>Agenda:</i> Outline programme, conference theme, ice-breakers/energizers, interactive sessions, breakouts, Q&amp;As, awards, time at leisure  <i>Pre &amp; Post Event:</i> Set-up, rehearsal, breakdown  <i>Main Meeting Room:</i> Numbers of people, seating style (theatre, classroom, boardroom, cabaret), dimensions, ceiling height, daylight and black out curtains, location of power sockets,  <i>Other Rooms:</i> Syndicate rooms, foyer/reception area, separate room for lunch/dinner, event office, store rooms, capacity and style for all of these rooms  <i>Meeting Room Hire:</i> Daily hire charges? Included in delegate rate?</p>	<p><b>Production Requirements</b>  <i>Meeting Room:</i> For main room &amp; syndicates, simple screen &amp; projector or more complex? Front/rear projection. Set, staging and lectern, sound system and CD player, microphones (number - lectern, radio or hand held), lighting, videos or DVDs to play?  <i>Other Requirements:</i> PowerPoint support, assistance with rehearsals, transcription, translation facilitator, key-note speaker, video recording, photographer, electronic voting, branding, signage, theming.  <i>Virtual Conferencing:</i> Video cameras, on-site production suite, fast web-link, web-portal, email link prior to event.</p>
<p><b>Food &amp; Beverage</b>  <i>Meals:</i> Formal, informal, stand up, sit down, buffet, private room, in restaurant, on-site, off-site  <i>Off Site Venues:</i> Walking distance / transfer (by coach or something else?), restaurant (private area, exclusive use), unique venue (check costs very carefully), marquee, themed evening, dine around.  <i>Drinks:</i> Welcome drink on arrival, coffee breaks in meetings, soft drinks/water in meeting rooms, drinks with lunch, evening drinks reception (from bar or trayed, with canapés), wine with dinner (on table or served), post-dinner drinks, drinks paid by open bar or on consumption (budget behind the bar)</p>	<p><b>Ground Programme</b>  <i>Approach:</i> Full event management or just a one off activity (e.g. one off site dinner)  <i>Activities:</i> Sporting, spectator, sightseeing, theatre, teambuilding (outdoor/indoor, structured/fun), sea, land, air, beach  <i>Entertainment:</i> Quiz/game, after dinner speaker, string quartet, pianist, band, disco, casino, table magician, caricaturist, fortune teller, impersonator, dancers  <i>Transfers:</i> To/from airport, on site, individual or group, chauffeur, car, minibus, coach, run shuttles, meet &amp; greet service.  <i>Hospitality:</i> Hospitality desk, guides (English speaking), advancing venues.</p>

### Event Planning

<p><b>Financial / Contractual / Insurance</b></p> <p><i>Budget:</i> Produce overall budget (per person and total), what is paid up front, on site, by individuals (inc. hotel extras)?, sponsorship opportunities? Final reconciliation</p> <p><i>Suppliers:</i> Signed contracts, carefully reviewed Ts &amp; Cs, purchase orders, payment schedules, cancellation/attrition, deadlines for info. (e.g. names)</p> <p><i>Re-Charging:</i> Event paid for by company or individual, process for collecting monies</p> <p><i>Insurance:</i> Event insurance. Individual travel insurance.</p>	<p><b>Communication</b></p> <p><i>Registration:</i> Web-based or manual entry – by email, fax or post. Dedicated phone or email address for enquiries.</p> <p><i>Personal Info:</i> Name, contact details, passport info, nationality (visa requirements), diets, medical, emergency contacts, credit card details</p> <p><i>Preferred Communication Method for Delegates:</i> Email, telephone, fax, via PA</p> <p><i>Pre-Event Communication:</i> Invitation, follow up letter, acknowledgement, pre-event work, pre-departure information, airline tickets (e-ticket/in wallets), teaser campaign, method of posting (courier, registered (signed by who?), normal mail)</p> <p><i>On Site:</i> Conference packs, welcome letters, badges, signage, gifts, branding</p> <p><i>Post Event:</i> Thank you letter, photographs, Q&amp;A follow up</p>
<p><b>Planning</b></p> <p><i>Pre-Event:</i> Project plan, key milestones, weekly/monthly reviews, pre-event briefing, off-site rehearsals</p> <p><i>On Site:</i> Number of people required on site (1 per 50), who does what, working schedule, advancing the event</p>	

### Measurement and Research

*Measures of success:* What does success look like? Provide at least three clear, measurable factors.

*Research for Business Impact:* Research some months prior to help construct the event.

*Immediate Pre-event:* Research immediately prior to an event (e.g. during delegate registration)

*Immediate Post-event:* Questionnaire completed at the event or immediately afterwards.

*Delayed Post-Event:* Research some months later. What messages remembered. What actions undertaken.

*Measure Change:* Compare pre and post event research to measure change and success.

*Different Levels:* Reaction, Satisfaction, Planned Action, Learning, Application, Business Impact, ROI

*Types of Research:* Quantitative to measure change. Qualitative to interpret results. Questionnaire (hard copy, electronic, on-line), Interviews (over telephone), Focus Groups. Real-time on-site. With the event organiser, stakeholders (i.e. end clients), audience.

*Notes* – Ensure cost of evaluation is accounted for in the budget. Aim for high response rates (50% = majority). Always communicate results back to audience.



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