

# Drop the Microphone Not the Ball

## *The Ultimate Checklist for Planning Memorable Events*



Whether it's your first event or 1,000th, a checklist is an effective way to make sure you stay on track towards delivering an amazing experience for your guests. We have provided a breakdown of critical event planning details and tasks in the form of a handy checklist. Adapt it for each unique event you plan, but, overall, you want to remember to:

- Set goals and objectives
- Establish budget—don't forget incidentals
- Create an Event Plan
- If you are going to manage the event in house, gather resources-technology, staff, etc.
- If you are going to contract a professional, reach out asap,
- Select a date and create a timeline to countdown to event day
- Reach out to invitees as soon as possible, building excitement with save the date as first communication.
- Find location and verify accessibility against guests needs
- Anticipate the unexpected (inclement weather, safety, extra guests, etc.)
- Survey attendee—feedback is crucial and shows you care

Event Name:

Event Location:

Event Date(s):

Key Stakeholders:

✓	TASK	DEADLINE	NOTES
<b>Pre-Event Planning</b>			
	Determine key stakeholders/planning committee members	4 months prior	
	Identify overall event goal, budget, target audience and success metrics	4 months prior	
	Calendar and host all planning meetings and serve as project lead	4 months prior	
	Host kick-off meeting to review planning timeline, roles & responsibilities, and event agenda	4 months prior	
	Execute contracts or internal forms for: reservation of event space, senior leadership, key hosts, partner and speakers	3 months prior	
	Coordinate payment needed to secure all speakers, venues, vendors, etc.	3 months prior	Save all invoices and receipts
	Create invitee list	3 months prior	
	Develop PR and social media plan if appropriate	2 months prior	
	Provide content (key dates, agenda, speaker info), preferred images, and general direction for Save-the-Date	3 months prior	
	Create Save-the-Date draft for review	3 months prior	
	Review & sign-off on Save-the-Date	3 months prior	
	Send Save-the-Date	3 months prior	
	Review food and beverages options; select catering vendor	1 month prior	
	Create invitation draft for review	1 month prior	
	Review & sign-off on invitation	1 month prior	
	Review and update invitee list for invitation	1 month prior	
	Send invitations	4-6 weeks prior	
	Implement ongoing outreach plan to confirm Yes RSVPs and to follow up with invitees who have not yet responded	Ongoing	Ensure dietary restrictions or special accommodations are collected from invitees
	Send weekly RSVP updates to key stakeholders	Weekly	Indicate those already confirmed in follow-up
	Oversee the development, receipt & review of any presentations	1 month prior	Utilize one branded template for any/all presentations
	Coordinate speaker practice sessions to fine tune message and delivery	1 month prior	
	Place catering order	2 weeks prior	Place any additional necessary orders (A/V, etc)
	Determine and order client and speaker gifts	2 weeks prior	
	Logistics check-in with speaker(s) to determine desired setup, A/V needs, and review event space	2 weeks prior	Send event space pictures, floor plans, or other descriptors
	RSVPs due	1-2 weeks prior	
	Contact event venue to determine logistical details	1-2 weeks prior	Space diagrams to locate nearest restrooms & coat closets, printing or business center needs, inclement weather backup space, etc
	Reserve transportation vendors if needed	1-2 weeks prior	

	Coordinate printing & fulfillment of non-marketing collateral pieces (handouts, programs, etc.)	1-2 weeks prior	
	Event confirmation email to registered attendees	1-2 weeks prior	
	Distribute host and onsite staff day-of instructions	1 week prior	Include address and exact room locations, dress code information, and arrival time. Send calendar invites as appropriate.
	Send final event communication to include attendee bios	1-2 days prior	
	Provide final headcount, dietary restrictions and any last-minute menu changes to caterer	1-2 days prior	Check final headcount deadline noted on your catering contract
	Create all printed event collateral such as name tags, placecards, name tents, signage	1-2 days prior	
	Host pre-conference meeting with team members to confirm all event logistics & responsibilities	1 day prior	Preferable to host this at event site - ask in advance if have use of the event space the evening prior to perform a walkthrough
<b>Event Date</b>			
	Hold staff meeting to review roles and responsibilities, timing, special instructions	2 hours prior to event start time	
	Notify catering of any last-minute headcount or setup changes	2 hours prior to event start time	
	Ensure event space is set appropriately - # of place settings, materials accurate, A/V correct, food and beverage in place and correct	1 hour prior	Exchange contact details with any onsite vendors you may need to contact during the day for last-minute changes or requests (catering, A/V, etc)
	Final check-in with speakers, review timing and that setup & materials are correct	1 hour prior	Test any microphones, video or music volumes to speaker's preferences
	All staff in place for guest arrival	30 minutes prior to guest arrival time	If available, place staff in strategic locations to welcome guests as they arrive. For example, someone stationed in a hotel or restaurant lobby to point guests in the correct direction of the event room.
	Oversee registration, ensure all attendees welcomed	Day of	Do they need wifi instructions? Where are restrooms? Where can they store bags, make private phone calls, or plug in devices?
	Manage timing throughout the day. Remind speakers and guests when breaks are about to end to ensure on-time start	Day of	
	Track expenses, save all receipts/invoices	Day of	
	Track final attendees	Day of	
	Assist guests with departure. Transportation needs, helping make sure they have their belongings.	Day of	Complete a sweep of the event space to be sure nothing left behind.
	Lead clean-up of event space as needed. Ensure any sensitive collateral collected and discarded properly	Day of	
<b>Post-Event Follow-up</b>			
	Determine post-event execution & follow up strategy (call report mandates, data integrity improvement, direct mail, etc.)	1-2 days post	
	Distribute post-event communication with final attendee list and follow-up protocol	1-2 days post	
	Create follow-up survey for inclusion in post-event email	1-2 days post	
	Create post-event email draft for review	1-2 days post	
	Review and sign-off on post-event email	1-2 days post	
	Send follow-up email to attendees	3 days post	
	Record final attendees in CRM	1 week post	
	Host post-event debrief with planning committee	1 week post	
	Send thank-you notes/gifts to speakers and/or attendees	1 week post	
	Finalize all bill payment and provide expense summary	1 month post	
	Run metric reports at 6, 9, 12 month intervals	Ongoing	

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