

Setting up an event, step by step

An event takes place in several stages. From the conception of the project until the end of the event, here is a list of step by step points to remember...

- **Preliminary phase**

- Create a planning committee and meet regularly.
- Determine what the main goal of the event is.
- Identify the target public and examine the most effective way to get your message to them.
- Decide who will deal with planning the event, i.e. if planning will be done in-house or externally.
- Prepare a preliminary budget.
- If necessary, locate all sources of revenue (sponsors, subsidies, booth rental, marketing, etc).
- Establish the registration fee and, if necessary, some reduced rates.
- Preselect at least two dates for the event.
- Choose the location, the meeting room (several, if possible) and the format of the event.
- Elaborate a preliminary schedule for the event.
- Prepare a budget.
- Define a promotional strategy, if necessary.
- In the event that it is organized by an external source, have a detailed estimate made.
- Select and send a request for estimate to the agencies and/or the specialists you want.
- Send a first information packet to the potential participants by email, electronic bulletin, mail or fax.
- Contact the speakers, personalities and if necessary, the press, to ensure their availability.

- **Option 1: Coordinate with external subcontractors**

- If you call upon an agency or a specialist, get estimates before hiring them.
- Set a date for your event.
- Contact the VIP speakers and send press invitations, etc.
- Send secondary information to potential participants, offering detailed information about the event and, if necessary, about the registration process.
- Write a press release if necessary.
- Start to prepare printed materials if necessary.
- Draw up a final list of the support staff a few weeks before the date of the event.

- Print the event program and required documents (labels, brochures, etc)
 - Arrange an insurance policy for the event (covering at least civil responsibility)
 - Work closely and coordinate regularly with the organizers.
- **Option 2: In-house organization**
 - Prepare a detailed schedule for initial organization, by identifying each task to be accomplished and assigning it to specific persons.
 - Negotiate rental fees and reservations, cost of meals, transportation and, if it is necessary, any complementary activities (activities for spouses, entertainment, etc).
 - Set a date for your event.
 - Contact the most important speakers and send invitations to the press, etc.
 - Send secondary information to potential participants, offering detailed information about the event and, if necessary, about the registration process.
 - Write a press release, if necessary.
 - Begin the preparation of printed materials if necessary.
 - Inspect the location, especially if you are not familiar with it.
 - Choose decoration and check on the set up times of the seating arrangements.
 - Rent audio-visual equipment and, if necessary, hire personnel.
 - Consider and decide on any security measures.
 - Arrange an insurance policy for the event (covering at least civil responsibility)
 - Try to prepare alternatives for unforeseen events.
 - Prepare a final list of the participants a few weeks before the date of the event.
 - Make appropriate arrangements for people with reduced mobility and also for any attendees who want to arrive a few days before the event or to remain for awhile afterwards.
 - Print the program and other necessary documentation (labels, booklets, etc) for the event.
 - Confirm every reservation and all the details.
 - Finalize the registration process at the meeting place if necessary.
 - **Things to do after the event**
 - Proceed with closing the accounts.
 - Send a letter to the sponsors, speakers, personalities, etc. to thank them for their participation.
 - Collect the opinions of the participants by email or newsletter.