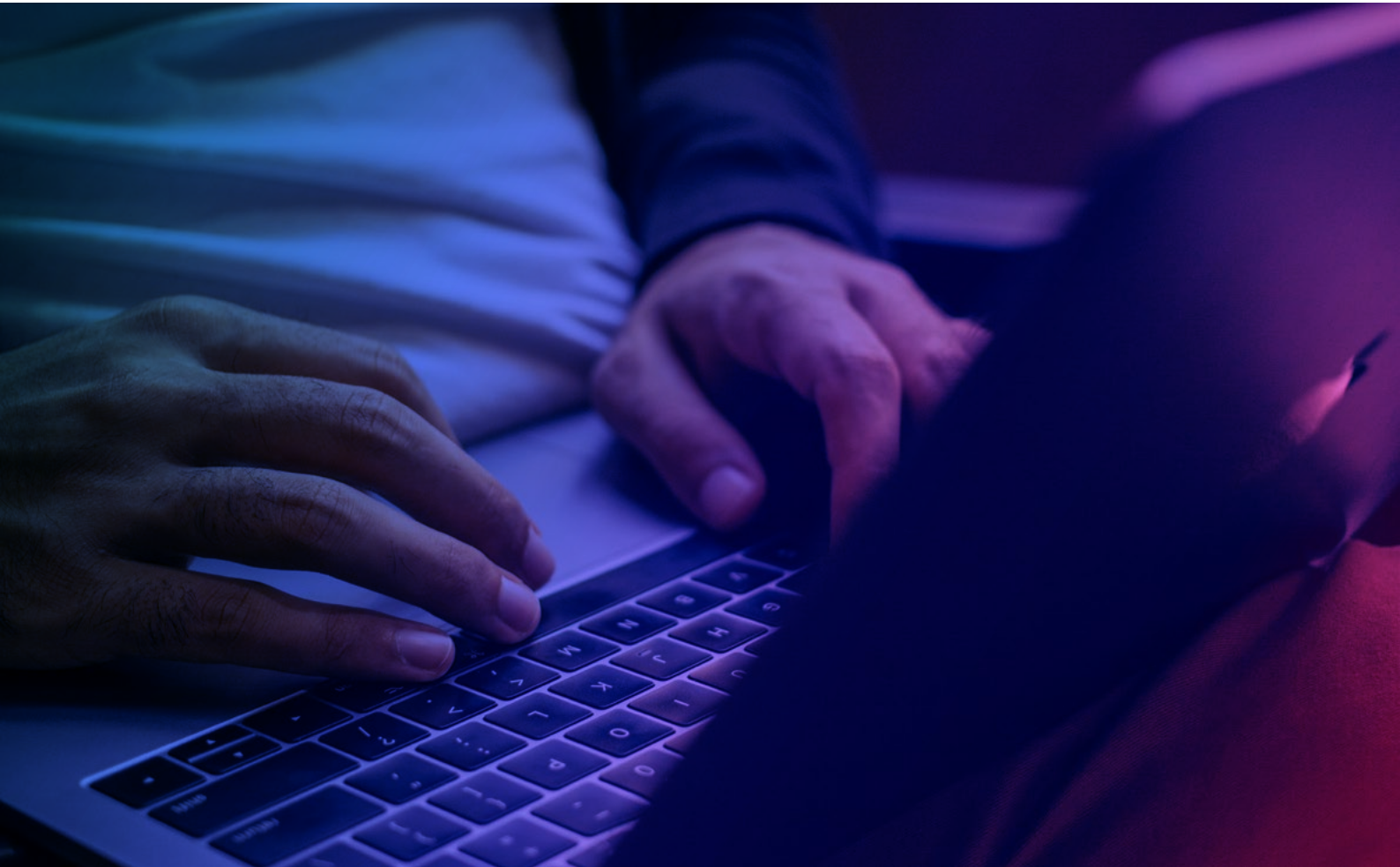




# Essential Planning for Event Marketers

Interactive planning guide





## Plan your next event

### **Assess your current events programme**

Collect the necessary information using our [event stakeholders questionnaire](#).

### **Determine your key initiatives**

Establish your event metrics and summarise findings using our [cheat sheet](#).

### **Develop your execution plan**

Build programme elements around a focused marketing strategy using our [event strategy](#) and [attendee experience checklists](#).

# Event stakeholder questionnaire

Ask your colleagues in sales, finance, corporate communications and marketing:

## Business Information

What **drives the success** of our business?

What are the **barriers to success**?

Why should customers choose **our brand vs. competitors**?

How should events **contribute to the success** of the business?

# Event stakeholder questionnaire

Ask your colleagues in sales, finance, corporate communications and marketing:

## Events Information

Who is the **target audience** for each event?

What **metrics** have been/should be used to evaluate event performance?

How were **past events planned**, and what has worked/not worked?

**Who contributes** to the development and implementation of events (internal and external constituents)?

What **attendee experiences were offered at past events**, and what has worked/not worked?

What should event attendees think of our **brand after the event**?

What actions should event attendees take as a **result of attending the event**?

What is the **budget** for each event?

## Event Cheat Sheet

Fill out this sheet to summarise your findings from the current events programme questionnaire. This will help you provide a realistic view of the current programme and requirements to improve results, an indication of the level of resources and required investments and ballpark estimates of expected performance.

### Event Name

### Event Budget

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### Current event goals

Goal #1

Goal #2

Goal #3

Goal #4

### Past results

Result #1

Result #2

Result #3

Result #4

### Expected results

Result #1

Result #2

Result #3

Result #4

# Event Cheat Sheet

## Anticipated changes

Change #1

Change #2

Change #3

Change #4

## Budget

Budget #1

Budget #2

Budget #3

Budget #4

## Expected results

Result #1

Result #2

Result #3

Result #4

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## Key stakeholders and colleagues

C-Level

Others

Sales and marketing

Summary

Event partners

Event agencies

## Event strategy checklist

A key element of an event plan is getting alignment around why the event exists, the types of experiences it should offer and the resources needed to implement. The listed elements are in the order in which they should appear in the plan.

### Positioning statement

What is different about this event that will prompt attendees to make time in their schedule/budget to attend?

### Elevator pitch

Craft a 30-word attendee-facing description of the event – is the intent clear and audience identified? Will attendees understand what's in it for them?

### Branding

What are the key brand attributes that will be reinforced in all experiences?

### Creative standards

How do we make this event high-impact?

### Experiences

What types of experiences will the event incorporate, and what is the role of each at contributing to event success? How will they be developed and implemented?

## Event strategy **checklist**

A key element of an event plan is getting alignment around why the event exists, the types of experiences it should offer and the resources needed to implement. The listed elements are in the order in which they should appear in the plan.

### **Content**

What content must the event deliver? How will content be developed and implemented?

### **Staffing**

What staff attributes are most important for the success of the event? How will we select the right staff? How will event staff be trained?

### **Venue selection**

How will the venue accommodate desired experiences and tie to the brand?

### **Products and pipeline**

What product/services will be promoted at the event?  
What impact do we anticipate having on postevent purchase behaviour?



# Attendee experience checklist

High-value, high-impact attendee experiences are the foundation of event success. Use this checklist to ensure that event plans are truly attendee focused.

## Attendee expectations

How will we deliver on the needs and “care-about” of the target attendee?

## Personalised experience

How will we create a personalised and differentiated experience?

## Access to experts

What are the key brand attributes that will be reinforced in all experiences?

## Business feedback

How will the event gather valuable feedback and input to strengthen products, services and sales follow-up post-event?

## Retention and risk

How will the event drive retention or address at-risk customers?

## Attendee experience checklist

High-value, high-impact attendee experiences are the foundation of event success. Use this checklist to ensure that event plans are truly attendee focused.

### Networking

What activities during and after the event will deepen and expand personal relationships?

### Extra touch

How will the event deliver “surprise and delight” moments?



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