



# Event Planner Checklist

Starting from scratch? This checklist will guide you as you plan and execute a Young Living event. Each part of planning an event requires delegation and trust because you can't host an event without a team to help you along the way. Find the strengths of those on your team and utilize them in the best event role for those strengths. Below you'll find a to-do list, as well as potential event roles that need a dedicated person to fill.

## To Do Pre-Event:

- **Create an event team.** Create your dream team and delegate roles to each team member. Have an open-table conversation with the whole team and discuss who wants to help where and whose strengths are the best fit for these roles. You can find these roles at the bottom of this checklist.
- **Create a vision for your event.** Determine venue and attendance minimums first. As you come up with what you want the event to look like, you will need to settle on how many people you plan on attending. Tentatively answer questions such as "Who? What? Where? When? Why?" Once you have a vision for the event, including the date, the time, and a number at which to cap your registration, you're ready to dive in!
- **Find a venue.** Your event could be at your home; however, if you are holding a larger event, start with a list of your favorite venues and call each, checking for availability and follow the below steps. You may also want to consider the following questions: What accommodations do they include? Do they have a minimum catering requirement? Is parking for attendees free? Is it easy access from the freeway or main roads? Do they have marquees to put up your event information?
- **Create an event resume.** Provide your potential venues with this simple document stating your needs for the event. Include staging needs, water stations, audio/visual needs, lighting, how you want the room set up, and how many hours you will need the venue for (take into consideration setup and takedown time), etc. Send your event resume directly to your venue contacts to help them structure your request and give you the most accurate price estimate for your event.

- **Get an estimate from your top venues.** This crucial step will help you manage your budget and understand your options. Weigh the cost against your needs for the event as you make your decision.
- **Visit the site.** Once you have narrowed down your venue options, visit the venue. Walk through and imagine your attendees walking in. What do you want them to see? How will you guide them to your event? Is the space open and inviting or cozy and intimate? Is there a place for registration?
- **Put down deposit on the venue.** Once you've found the right venue, reserve your event time by putting down the deposit and signing the venue's contract.
- **Create show flow.** While YL provides you with an agenda and script, you'll want to consider additional topics you might want to cover during your rally event. Break down the event to the minutes needed for each section of the event, plug in additional topics/speakers to the agenda provided, and plan realistic transition times between speakers or activities.
- **Finalize your agenda.** Type up an event agenda and make sure everyone on your team has a copy and knows what to expect for the big day. Clear communication and expectations make for the best event.
- **Create marketing collateral.** Marketing is your first impression for potential event attendees and should be clear and professional. Include your biggest selling points (e.g., guest speakers, fun product raffles, and whatever else makes your event *the* event to attend). Please refer to the Live Your Passion Rally style guide for specific guidelines and suggestions for any and all marketing collateral. Additionally, have signs printed using the predesigned signs from YL.
- **Create a registration page.** Most event hosts use [Eventbrite.com](https://www.eventbrite.com) or a similar free online event hosting website for attendee registration, but if you have a team member with the coding experience to build a registration page, then you can delegate this step to him or her. Just remember to keep it simple and capture the important information: ID number, name, email, phone, and dietary concerns if you are supplying food.
- **Send out your invitations to potential attendees.** Include your event's marketing collateral through emails, snail mail, and social media. Use phone calls and word of mouth to help get the word out and build excitement. Following up is equally important: Make sure to reach out to your registered attendee list the day before the event to confirm attendance.
- **Prepare.** As the days get closer to your event, make sure you have signage, décor, handouts, giveaways, registration lists, A/V equipment, and any necessary materials ready.
- **Stay in constant contact.** You will need your whole team to be on the same page and included in the prep stage of the event. Setting clear expectations is the key to success. Make sure you have clarified exactly what you need from the A/V and lighting director if you are holding your event outside your home—you don't want any surprises.

- **Have a run-through with emcee and speakers.** This can be in person or video chat if necessary. Walk through the whole program starting with arrival time and make sure the flow is logical and the transitions are seamless.
- **Create a registration list.** The day before the event, make sure you have an updated attendee registration list and have it broken down into the sections you have planned for your registration tables. When using Eventbrite.com, make sure to download the event check-in app to your phone or tablet to make event check-in easy. A simple tutorial with your check-in staff is recommended.

## To Do Event Day:

- **Arrive early.** Allow yourself and your team enough time to get everything set up, and plan additional time to deal with any unforeseen situations. The more time you allow the better—it never hurts to be ready early.
- **Divide and conquer.** Have your team spread out to tackle registration, signage, décor, and other necessary items. If you are holding your event outside your home, the lighting director and A/V technician(s) all need to be in place, setting up, and testing equipment at least two hours prior to the start of your event.
- **Smile.** Everyone is going to be busy, and it's easy to let the hustle and bustle of the event create stress and negative attitudes. It's important to smile and have fun. Things won't always go according to plan, but that's okay. You can and will have a great event regardless of the little things!
- **Open doors on time.** Don't make your attendees wait in the registration line or at the doors too long. It's important to keep their opinion of the event as positive as possible. The quality of an event rests on much more than just the content—first impressions are everything.
- **Make sure everyone is in place.** The emcee and speakers should be backstage or nearby with their microphones ready to go at least 20 minutes prior to the start of the meeting. The stage manager should keep track of time and have everyone on the same page.
- **Start and end on time.** Be respectful of your attendees' time by sticking to your advertised schedule and planned material. People often stop listening after you have passed the event's scheduled completion time.
- **Post.** Social media is a great tool to raise awareness and to let people share what they are liking about the event. Use the Young Living-approved hashtag #RallyYourPassion to create a conversation around all the rallies! When starting the meeting, get the social media ball rolling by announcing the hashtag and encouraging attendees to post, use Facebook Live, and other channels. You may even consider assigning a team member to post to social media throughout the event to keep the conversation going.

- **Enjoy the fruits of your labor.** Just because you organized the event doesn't mean you don't get to enjoy it for a little while. You worked hard to make the event come alive, so take a few minutes and enjoy yourself. Connect with your friends, guests, and new contacts—make sure you have fun too!

## Event Roles:

An event can be so much more successful if you assign individuals specific roles and ask for help. It can be hard for some to let go of the control; however, in the long run everyone will have a better experience. Giving those on your team responsibilities and leadership opportunities enforces ownership and a connection to the event. Take the strengths of your team members into consideration when assigning them roles such as:

- Event manager
- Assistant manager
- Marketing manager
- A/V director and technicians
- Lighting director
- Treasurer
- Registration lead
- Stage manager/show flow manager
- Speakers
- Emcee