

Event Success Checklist

4+ Weeks Prior to Event

1. Choose Event Theme: _____
2. Edit Flyers, Postcards, E-blast Content: _____
3. Finalize Invite Lists (all patients, specific patients, etc.) _____
 - a. Decide on guest gifts/favors or giveaway item and place order (if applicable)
4. Customize Topic Educational Material: _____
5. Print and Display Flyer in Office: _____
6. Mail/Email Event Invitations: _____
 - a. Decide if you will require RSVP for attendance. If so, create an excel spreadsheet or document of some type to record RSVP's
7. Create Facebook Ad/Event: _____
8. Create/Draft Speaker Presentation (if applicable) _____
9. Adjust clinic schedule for event day if in-office _____
 - a. May need to end clinic 1-4 hours prior to event to allow time for setup or travel time to event location depending on start time of event
10. Contact Vendors: Food, Wine/Beverage, Event Space _____
 - a. Get price quotes, finalize menu selections and submit contracts/deposits

Schedule an additional cleaning with office cleaning company day before event if in-office

2+ Weeks Prior to Event

1. Finalize speaker presentation including preparation of any equipment that will be needed (projector, screen, etc.) _____
2. Finalize details with all vendors including delivery timing _____
 - a. Food and Caterer/Servers
 - b. Wine/Beverage and Bartender
 - c. Cleaning company additional cleaning
3. Finalize details of any rental equipment/items if needed (chairs, tables, A/V equipment, etc.) _____
4. Count/double-check quantities of guest favors (if applicable) _____
5. Send Event reminder e-blast _____

1 Week Prior to Event

1. Finalize Guest List and Send 1 Week Event Reminders _____
2. Gather all presentation items (models, plaques, gifts, etc.) _____
3. Finalize presentation and have speaker complete a run-through going through all slides and using any presentation items _____
 - a. Load presentation onto laptop or flash drive and ensure it loads correctly
4. Print any items that will be handed out- raffle cards, information collection cards, promotional flyers, etc. _____

1-2 Days Prior to Event

1. Send Reminders to all attendees (email and phone call) _____
2. Remind staff of any materials they need to bring: _____
 - a. Camera, Handouts, Gifts, etc.
3. Finalize Attendance numbers and handle last-minute RSVP _____
4. Ensure that office is well cleaned and ready for guests (if event is in-office) _____

Day of Event

1. Arrive/Begin Set-up Early! _____
2. Ensure Event space is set up correctly _____
3. Facilitate Vendor Delivery/Set up _____
4. Take photos/video of your event or coordinate with photographer/videographer _____
5. Collect registration cards and ensure guests are entered to win giveaway item or gifts are distributed to guests _____
6. Take notes during the event about flow of activities- make note of anything that worked well or could be improved in the _____

Post Event

1. Follow Up/Send Thank you cards and follow up communication to those who attended (this may be different for those who moved forward with your offer and those who attended but did not) _____
2. Follow up with people who RSVP'd but did not attend _____
3. Post photos to social media, prepare them to include in your next newsletter, etc. _____
4. Ensure that all attendee information is entered into your database or patient management system for future communication _____
5. If you chose to do a giveaway, notify the winner that they have won a prize! Be sure to snap a pic of them with the doctor or team member when they pick the prize up from your office to share on social media/newsletter _____