LOGISTICS CHECKLIST

Below are items to consider as you put together the plan and logistics for your virtual event.

EVENT TITLE:

Session 1	Session 2
Title:	**Title:**
Date:	**Date:**
Platform(s):	**Platform(s):**
Tech/ Facilitation:	**Tech/ Facilitation:**
Phone:	**Phone:**
Email:	**Email:**
Estimated Number of attendees	**Estimated Number of attendees**

Session 3	Session 4
Title:	**Title:**
Date:	**Date:**
Platform(s):	**Platform(s):**
Tech/ Facilitation:	**Tech/ Facilitation:**
Phone:	**Phone:**
Email:	**Email:**
Estimated Number of attendees:	**Estimated Number of attendees:**

SEVEN TO EIGHT MONTHS BEFORE EVENT

ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐ **HOLD TEAM MEETING**		Determine event, audience goals and objectives, date, time, location, and budget; determine who can enter into contracts for the event.
☐ **PREPARE EVENT SPECIFICATIONS**		Create a document outlining event information, such as # of attendees, # of sessions (general and breakout/concurrent), # of facilitators needed, etc.
☐ **RESEARCH TECHNOLOGY/ FACILITATION COMPANIES**		We recommend sourcing two or three companies to find the one that best suits your needs and who you are most comfortable working with. Ask for references if it is the first time talking/working with the company.
☐ **RESEARCH VIRTUAL EVENT PLATFORMS**		We recommend sourcing two or three platforms/ companies to find the one that best suits your needs and who you are most comfortable working with. Examples of virtual event platforms are Zoom, GoToMeeting, and Microsoft Teams .
☐ **CONSIDER ADDITIONAL FEES**		Examples: Upgrading software to accommodate virtual event platform, shipping equipment to speakers who may not be fully equipped for virtual presentations, etc.
☐ **DISCUSS SPONSOR OPPORTUNITIES**		Discuss where and how to position sponsors to garner the most exposure during the virtual event.
☐ **CONTRACT NEGOTIATIONS WITH TECHNOLOGY/ FACILITATION COMPANY**		Review agreement carefully before signing and be sure to check and understand the cancellation policy and fees.
☐ **SELECT PLATFORM AND NEGOTIATE CONTRACT**		Review agreement carefully before signing and be sure to check and understand the cancellation policy and fees.

SEVEN TO EIGHT MONTHS BEFORE EVENT

☐	**SHARE PRELIMINARY EVENT SCHEDULE**		Share your preliminary event agenda with event team, facilitators, and tech company.
☐	**CREATE MEETING TIMELINE AND MARKETING PLAN**		Name event and select URL, outline tasks, responsibilities, and due dates. Include meeting content, session logistics, website, admin/ coordination, speaker/presenter coordination, etc.
☐	**CREATE EVENT WEBSITE AND SHARE WITH TEAM**		Determine which platform to use (Cvent, Google forms, etc.), the best way to market the event, placement of sponsor logos, fees (if applicable), attendee information to capture during registration (name, org., email, time zone, etc.), what information to share (agenda, session logistics), etc.
☐	**CREATE SOCIAL MEDIA TAGS**		Create appropriate social media tags for event (conference hashtag, Twitter handle, etc.) to share with attendees.

FOUR TO SIX MONTHS BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐	**REFINE PRELIMINARY EVENT SCHEDULE**		Update with any new information/changes and share with event team, facilitators, and tech company.
☐	**RECRUIT PLANNING COMMITTEE**		Identify any subcommittees needed based on your preliminary agenda.
☐	**IDENTIFY AND RECRUIT SPEAKERS**		Identify and reach out to potential speakers for your event.
☐	**CREATE ATTENDEE COMMUNICATION LIST**		Create attendee communication list. Examples include invitation to register, registration confirmation, session log-in information, meeting survey, etc. Also, identify pieces that will need to be translated.
☐	**FINALIZE AND LAUNCH EVENT WEBSITE AND REGISTRATION LINK**		Launch tested and approved event website and prepare for event/registration inquiries.
☐	**SEND ATTENDEE COMMUNICATION**		Send event invitations. Address any questions and create FAQs as needed.

THREE TO FOUR MONTHS BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐	REVIEW EQUIPMENT		Work with speaker's/presenters' team(s) to identify if anyone (team members, presenters, etc.) needs equipment to participate or manage their tasks for the event.
☐	REFINE PRELIMINARY EVENT SCHEDULE		Update with any new information/changes and share with event team, facilitators, and tech company.
☐	CREATE PRELIMINARY LIST OF EVENT MATERIALS		Compile a list of items that will need to be designed or translated. Possible examples include agenda, speaker/presenter presentations, etc.
☐	CONFIRM VIRTUAL ROOM SETUP		Confirm URL link for each meeting session.
☐	FINALIZE SPEAKERS AND PRESENTATIONS		Finalize event speakers and work with them on their presentation and equipment needs.

TWO TO ONE MONTH(S) BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐	SEND ATTENDEE COMMUNICATION		Send registration reminder and continue marketing event.
☐	CREATE RUN OF SHOW		Use final agenda to create a run of show highlighting sessions, staff, and speaker responsibilities, and equipment/materials needed for each session.
☐	FINALIZE EVENT MATERIALS		Design documents, proofread/edit, translate, and prepare for distribution.
☐	DETERMINE IF ADDITIONAL STAFF IS NEEDED		Secure if needed and confirm their roles.
☐	SEND ATTENDEE COMMUNICATION		Email message to confirm session registrations and to share appropriate session URL link.

ONE TO TWO WEEK(S) BEFORE EVENT

ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐ FINALIZE EQUIPMENT WITH SPEAKERS/ PRESENTERS AND TEAM		Confirm that team, facilitators, presenters, and speakers have all the equipment needed to participate.
☐ FINALIZE RUN OF SHOW		Finalize run of show document and share with team.
☐ HOLD EVENT REHEARSAL		Walk through run of show with speakers, presenters, facilitators, and team to address any questions or obstacles before the live meeting.
☐ SEND ATTENDEE COMMUNICATION		Send "See You at the Event" email to all attendees. Confirm date, time, and URL link, and distribute any meeting materials.

DAY BEFORE AND DAY OF EVENT

ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
☐ MANAGE THE EVENT		Troubleshoot any issues with platform and staff. Take notes if you can on things that went well and things that could have been improved so you don't forget. Ensure all attendees are taken care of with questions, concerns, etc.
☐ DEPLOY EVENT SURVEY		Deploy event survey to all attendees at end of event or the day after.
☐ DEBRIEF WITH STAFF		Schedule a debrief meeting with staff and others involved to evaluate the event. Celebrate successes, record feedback and changes for next time, and thank staff.
☐ SEND THANK-YOU NOTES		Send a personal thank-you note to speakers and sponsors. Express your thanks to the venue/vendor and all involved.