

10 STEPS TO A SUCCESSFUL EVENT

Hosting an event - whether virtual or live - takes planning, collaboration and effort. It should also be fun! Follow these tips to wow your audience.

1: SET PURPOSE, GOALS & AUDIENCE

Why are you bringing people together? What do you hope people will accomplish, learn or take away from this event? Who is your audience? Answer these questions first to create a clear understanding of your target market and purpose.

2: CREATE PLANNING TEAM

Six key leaders for planning an event:

- Project manager
- Facilitator
- Tech support
- Outsourcer
- Promoter
- Fundraiser

Look for ways to double up on roles or outsource if your organization is small!

3: SET YOUR BUDGET

Budget first for overall event costs, then divide into committee budgets and finally line items per committee. Share how expenses will be reimbursed.

4: SET DATE, TIME & LOCATION

Give 6-8 weeks of lead time! Keep long events under four hours and short events around 30-60 minutes. Choose the location or virtual hosting platform that works best for your audience and budget.

5: START PLANNING

Build out an awesome agenda that keeps your audience engaged! Keep the momentum going with upbeat music at the beginning, between speakers and during built in breaks.

Use ice breakers to build rapport. Mix up your content using videos, speakers and interactive activities along with your music and ice breakers.

Use connection tools within your virtual platform like annotation marks, chat boxes, polls and breakout rooms. Tell your audience who to contact for a tech issue, and show them how to use the platform. Don't assume everyone is a tech guru!

6: PRACTICE

Host a dress rehearsal at least a week before your event. Run through the whole agenda, test your tech tools and edit what doesn't work or flow properly.

7: GO LIVE

Be confident and your work will show! Go in excited to share great info with your audience and keep the momentum going!

8: CELEBRATE

You did it! Take at least 24 hours to rest!

9: FOLLOW UP

Send promised info and event survey to guests. Post event photos on social media.

10: REGROUP AND ARCHIVE

Talk about what did and didn't go well. Review event survey. Archive event materials in an accessible location.



USEFUL TOOLS

Try these tech tools to execute smooth event planning and promotion.

PROJECT MANAGEMENT

- Trello
- Asana
- ClickUp
- Google Drive - Docs, Sheets & Jamboard
- Slack

VIRTUAL HOSTING PLATFORMS

- Zoom
- Microsoft Teams
- GoToMeeting
- Google Hangouts
- YouTube Live

EMAIL MARKETING

- Mailchimp
- Constant Contact

WEBSITES

- Google Sites
- Squarespace
- Wix
- Weebly

SOCIAL MEDIA

- Planoly
- Later
- Hootsuite
- Buffer
- Tailwind
- Preview

PRESENTATIONS AND GRAPHICS

- Google Slides
- Canva
- Adobe Photoshop Lightroom
- PicMonkey
- Unsplash

EVENT SURVEYS AND REGISTRATION

- Google Forms
- Survey Monkey
- Eventbrite
- Typeform
- VideoAsk