

Event Timeline

Event: _____ Goal: _____

Customize this timeline to suit your event. Remove those action items that aren't applicable and create new action items as needed. Once the date of your event is confirmed add the specific dates for each action item in the deadline column to keep you on track. Good luck!

Action Item	Responsible Person(s)	Deadline	Status
Select team to organize event		12 weeks prior to event	
Conduct initial planning meeting to discuss: <ul style="list-style-type: none"> • Business reason for event / demand • Event goals and expectations • Target audience / mailing lists / mailing size • Type of event – roundtable, full seminar, breakouts • Length of seminar / time of day • Event concept / topic / theme / agenda • Potential partners / sponsors / speakers • Advertising / promotion • Approximate event date • Budget 		12 weeks prior to event	
Contact potential joint venture partners or sponsors		11 weeks prior to event	
Contact potential speakers		11 weeks prior to event	
Finalize seminar location / conduct site visit		10 weeks prior to event	
Draft budget		10 weeks prior to event	
Finalize agenda and confirm speakers		8 weeks prior to event	



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<ul style="list-style-type: none"> • request mailing list • request speaker bio • request company logo 			
Confirm joint venture partners or sponsors: <ul style="list-style-type: none"> • request mailing list • request company logo and promotional materials 		8 weeks prior to event	
Design Save the Date post card.		8 weeks prior to event	
Confirm invitation list, including emails.		8 weeks prior to event	
Complete text/design for print invitation.		8 weeks prior to event	
Mail Save the Date post card.		7 weeks prior to event	
Print invitations.		7 weeks prior to event	
Order participant giveaways		7 weeks prior to event	
Send speaker information packets to include: <ul style="list-style-type: none"> • Agenda • Instructions for shipping marketing materials • Date presentation is due • AV requirements 		6 weeks prior to event	
Order speaker gift		6 weeks prior to event	
Mail or email invitations.		3 weeks prior to event	
Send e-mail invitations via firm's email vendor, e.g., HubSpot, Constant Contact, Emma		3 weeks prior to event 2 weeks prior to event 1 week prior to event	
Handout materials due from speakers.		2 weeks prior to event	
Notify all Partners/Managers of registration list to date via e-mail; remind them to		2 weeks prior to event 1 week prior to event	



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promote to clients/prospects			
Write introduction and forward to firm opening speaker; draft housekeeping notes; write closing comments and thank-yous		1 week prior to event	
RSVP date		1 week prior to event	
Call key clients that haven't responded to the invitation.		1 week prior to event	
Assemble handouts, including: <ul style="list-style-type: none"> • Profile of speaker • Evaluation form • Promotional items • Name tags • Agenda / program • Speaker presentations • Firm marketing materials 		1 week prior to event	
Make reminder calls to individuals who have responded to tell you they will be attending.		5 days prior to event	
Confirm guaranteed attendance to event site, room set up, audio-visual needs, and menu.		4 days prior to event	
Call speakers to check in one last time		3 days prior to event	
Forward final registration list to firm participants		3 days prior to event	
Prepare registration materials: <ul style="list-style-type: none"> • Registration list, sign-in sheet, nametags, etc. 		1 day prior to event	
Make any last-minute changes to participant materials		1 day prior to event	
Arrive at seminar site 1-2 hours before registration time		Day of event	
Inspect set-up		Day of event	



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<ul style="list-style-type: none"> • Meet with on-site meeting coordinator • Room layout, seating configuration, AV equipment, lighting, registration table(s), signage 			
Confirm food & beverage timing and set-up		Day of event	
Place participant materials on tables or chairs; set up registration materials		Day of event	
Conduct seminar/event.			
Firm attendees meet to debrief event, coordinate follow up		1-2 days after the event	
Mail follow up letters.		1 week after the event	
Follow up leads generated from event.		1 week after the event	
Call key prospects who didn't attend and offer in-person seminar recap and materials		1 week after the event	
Summarize evaluation results		1 week after the event	
Compile detailed company profiles on any new hot prospects		2 weeks after the event	
Add seminar participants to firm's prospect mailing list		2 weeks after the event	
Develop action plan for continued contact with hot prospects		3 weeks after the event	



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