

# Your project management checklist



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# Event checklist

Use the Penguin project management checklist to ensure that your events run smoothly.



## 4 - 6 Months ahead

- Recruit your event committee
- Establish the event goals and objectives
- Select a date for the event
- Create your event budget - get cost estimates for rentals, catering, equipment, travel, accommodation, etc.
- Choose the venue - have all details from the start to avoid double bookings
- Identify and confirm speakers, presenters and entertainers - ensure all contracts are signed if needed
- Make the necessary travel arrangements and have enough space for guests to park
- Identify and contact potential sponsors - with a sponsorship proposal plan, offering them exposure in return for sponsorship
- Create and launch a publicity plan, brand the event and make sure all relevant platforms are used to share promotional material
- Investigate the need for special permits for the event

## 3 - 4 Months ahead

- Establish and finalise the various event topics and presentation
- Send event emails to all previous attendees
- Submit event information to all local event calendars
- Optimise the event for search engines**
- Create a website for online registrations and distribute all information accordingly
- Use client testimonials and acknowledge them on all platforms
- Finalise the details i.e. catering, A/V equipment, registration setup, parking, signs, VIP's, etc.
- Submit the required deposits
- Prepare media kit materials
- Create Facebook event - add promotional video onto Facebook and YouTube (or suitable social media platform identified)
- Organise security and waste management if needed.
- Draft all speeches if needed - welcoming speech, closing etc.

## 2 Months ahead

- Send a reminder to the attendees. Event applications will give a full view of registration, agenda, directions, etc.
- Confirm travel and accommodation arrangements
- Request a copy of the speech and presentation
- Follow up with sponsors and finalise catering
- Establish a backup plan and ensure all team members understand their responsibilities

## 1 Week ahead

- Finalise registration list, name badges and media attendance
- Ensure proper signage and sponsorship materials are ready for exhibition

## 1 day ahead

- Meet with all committee members and go through the event checklist
- Look at the event from an attendee point of view and make sure everything they are expecting will be there
- Look at the event from media point of view
- Look at the event from production point of view and make sure everything is in place and can run smoothly

## Day of the event

- Gather staff for briefing
- Ensure the registration station is well planned to prevent queues building up
- Make sure all committee members have each other's contact details and that they will be reachable at all times. Two way radios can be very useful for big events
- Make all lists, signs, sponsorship material, directions, available etc
- Welcome all attendees and thank all VIP attendees
- Ensure catering will be served at the correct times
- Make sure all technicalities are in order i.e test sound and AV just before the guests arrive

## After event

- Remove all equipment and waste
- Send out thank you letters to all attendees, sponsors, speakers, media etc
- Evaluate the event and make sure to indicate where actions need improvement
- File all receipts, documents, final registration numbers and related data
- Update budget and calculate ROI for stakeholders
- Follow up communication with all the event participants - survey
- Evaluate and produce the event report

# Activation checklist

## Phase 1: 4-6 Months before activation

- Define the activation goals and objectives
- Know your budget
- Ensure safety file is updated
- Plan and create your social media campaigns around the activation.
  - These campaigns can vary according to the brands choice and requirement.
  - This is usually influenced by the brands budget for their activation.
- Submit a **JOC Application (Joint Operations Committee)** comprising of the City's Municipal Entities.
  - The mission of JOC is to ensure the compliance of all event organisers and their adherence to the by-laws and regulations of the city, as well as the safety at sports & recreational activations, Act no. 2 of 2010.

## Phase 2: 4-6 Months before activation

- Secure venues and pay relevant deposits
- Contact all suppliers and be aware of their required deadlines in order to deliver
- Suppliers can include catering, venue, transport & logistics and activation specific suppliers
- Compile a running order / activations plan. This will include a timeline of each element that goes into the activation from start to finish.

## Phase 3: 2-4 Months Before activation

- Document all supplier requirements and deadlines
- Draw up a logistics plan which can allow a 25% time buffer for last minute hiccups

## Activation elements suppliers need to consider

(Most activation's will vary from each other, depending on product or service being promoted and how the brand is portrayed to the customer at the activation)

- Catering (All catering requirements, incl. Halaal and dietary requirements)
- AV Equipment (Technical suppliers)
- Electrical requirements (Venue requirements & Electricians)
- Transport (For staff and customers)
- Accommodation (Staff, Suppliers & Client)
- Registration for customers
- Security (Staff, equipment and customers)
- Safety & Medical (Staff & Customers)
- Waste Management (During & Post Event)

### Staffing:

- Client
- Activation
- Project Manager
- Promotional Staff etc.

## 1 Week ahead

- Finalise registration list and name badges, media attendance
- Ensure all signs are in place and all sponsorship materials are ready for exhibition

## 1 day ahead

- Meet with all committee members and go through the event checklist
- Look at the event from an attendee point of view and make sure everything they are expecting will be there
- Look at the event from media point of view
- Look at the event from production point of view and make sure everything is in place and can run smoothly

## Setup of activation

Communication between all suppliers and staff can be done smoothly if the following elements are in place:

- Set up of the activation can vary from a few hours to a few days and even weeks, depending on each activation
- Each staff member needs to understand their responsibility during the setup process
- A communication system is set up either via radio or an alternative method
- Each staff member needs to understand and meet their respective deadlines – these are usually influenced by venue- and safety requirements
- Setting up and testing of all equipment

## During the activation

- Gather staff for a briefing
- Test all AV equipment
- Ensure all areas of the activation are clearly marked with relevant signage
- Welcoming all customers and VIP's
- Stick to the approximate time frame for the activation

## After the activation

- Removal of all waste and debris
- Recon all costs and account for staff costs
- Update the budget to indicate Return on Investment (ROI) for the client
- Follow up communication with customers is required
- Event report & learnings to be presented to client



Make sure that each person knows exactly what is expected from them before a project commences and call a team meeting to present the scope of the project to all those involved.

- Loss of focus

It's really important to keep **focusing** when working on a big project as the project manager needs to lead the team to an end goal. Don't lose track of the bigger picture by getting involved with too many other tasks.

- The wrong project manager for the right project

Not every project manager is suited for every project. It feels like you're working with a boring robot when your project manager is impersonal. According to Carol Woolfe, a project manager at a leading provider of software and services for nonprofits, **Blackbaud**, "telling you what needs to be done, by whom, and when to do it to get to your goal...don't hesitate to listen to new information and suggestions that come up along the way".

- Unable to divide project into smaller tasks

You are under a lot of pressure as project manager and it is expected that you will deliver on your promises. It happens very often that project managers police team members for projects and updates. The key is to avoid micromanaging, but let it be known from the start that there will be regular updates for the duration of the project.

- Lack of communication

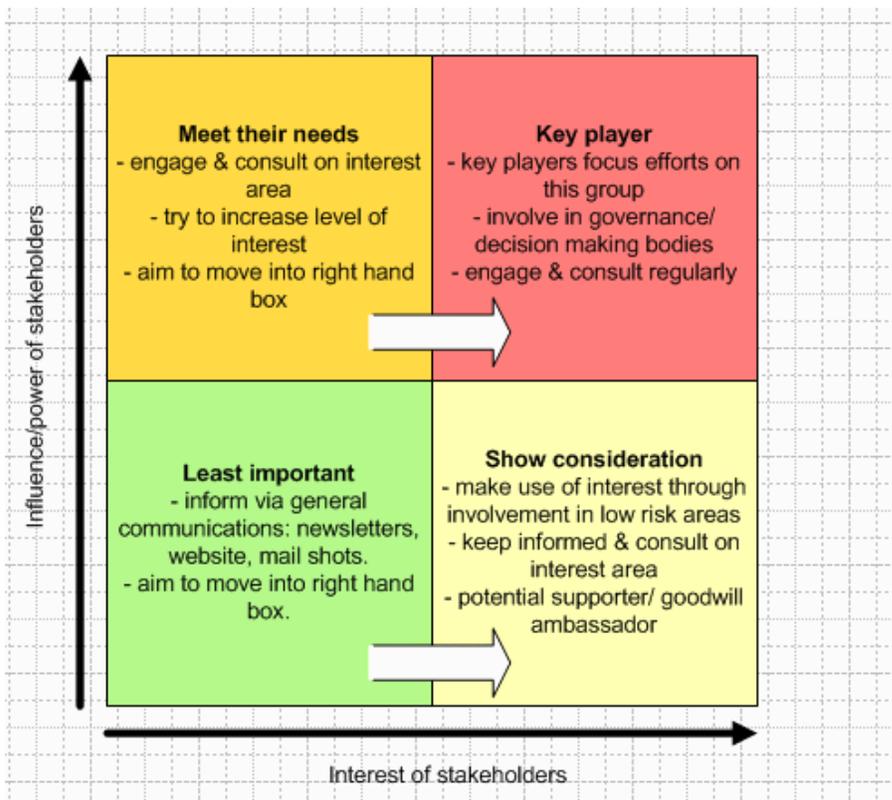
A study conducted by the **Project Management Institute** revealed that a lack of communication leads to failure. It states that "companies risk \$135 million for every \$1 billion spent on a project and new research indicates that \$75 million of that \$135 million (56 percent) is put at risk by ineffective communications, indicating a critical need for organisations to address communications deficiencies at the enterprise level." Good communication skills are at the heart of any well-managed project. If you're not discussing the project, budget and deliverables with team members, you won't achieve success. If you put simple guidelines in place like regular status updates and deliverable reviews, you are well on your way to success.

- Being negative

Being worried or nervous is normal in project management, but it is manageable. It's easy to focus on the negative aspects of a project and what you think is missing, but don't be too critical of yourself as this will hamper your confidence. Always challenge yourself to see the positive aspects in every project and what you have to bring to the table.

- Providing no updates

Projects tend to have a number of people who regularly need to know the progress and issues of it. Use the following chart to prioritise stakeholders according to their needs and authority.



<http://www.stakeholdermap.com/stakeholder-analysis...>

Once you have mapped your stakeholders you can focus your efforts on the highest priority groups while providing sufficient information to keep the less powerful groups happy.

- Resistant to change

Projects change on a daily basis - just think about missed deadlines, being over or under budget, missed or cancelled meetings, etc. The important thing is to embrace change and continue guiding people in the right direction. You can't be rigid in the way a project is managed as you'll be setting yourself up for failure. Always keep an open mind and do what is best for the team- even if it means starting over.

If you feel like we've missed common mistakes project managers make, feel free to add it to our list by commenting on the post below.

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