

EVENT CHECKLIST	
LOGISTICS MAIN POINTS:	WHO / DATE:
Event lead planner:	
Event coordinator:	
Event type:	
Date for the event:	
Event start and end time: All day event or pm event?	
Staff meeting dates and times	
RSVP goal	
Number of consultants needed for event?	
CRITICAL DATES TO SET:	DATE:
Event pre-planning meeting - 8 weeks pre-event.	
Logistics and graphics meeting - 7 weeks pre-event.	
Staff event overview and sales training - 6 weeks pre-event.	
Event marketing and phone/consultation skills meeting - 5 weeks pre-event.	
Final graphic and marketing meeting - 6 weeks pre-event.	
Start emailing clients and advertising in office and online - 4 weeks pre-event.	
Status meeting and RSVP check - 3 weeks pre-event.	
Status meeting and RSVP check, call campaign if needed - 2 weeks pre-event.	
Final status meeting: Checklist review, call campaign if needed - 1 week pre-event.	
Post event meeting: Statistics, feedback, set next event - 1 week post-event.	
MARKETING, ADVERTISING & ATTENDANCE:	WHO / DONE?
Event grand prize:	
Event door prizes:	
Final event pricing and discount grid	
Event name or slogan	
Event graphic design image	
Event flyer verbiage	
Who will be doing the e-blasting?	
Who will be doing social media posting month before event?	
Who is in charge of getting event flyer on the website?	
Who is in charge of posting event flyers in the office?	
Who will respond to social media interested clients?	
Will you plan to do an outbound call campaign? Who leads?	
Will you get support from a vendor company?	
What food and drinks will be provided at the event?	
Will you offer patient financing? Is it set up already?	
Block office time off for the event starting 3 hours prior	

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MARKETING & E-BLAST SCHEDULE:	DATE:
Advertising start date - 4 weeks pre-event	
Final graphics ready for: FB, Instagram (Flyer, JPG, PDF formats)	
E-Blast (Suggested send on Tue or Wed @ 10am) starting 4 weeks pre-event	
3 weeks pre-event	
2 weeks pre-event	
1 week pre-event	
48 hours pre-event	
Post on website, in-office, FB, Instagram, EventBrite, Other?	
Create, review & finalize the presentation for the event	
Coordinate patient testimonials or staff testimonials for event	
Come back coupons (If applicable to all attendees)	
EVENT STAFF & FACILITY SCHEDULING:	WHO:
Block the office from scheduling patients 3 hours pre-event	
Print event forms and pull patient files	
Front desk for event - Who will be working it?	
Presenter for event - Who will do the presentation?	
Consultants for event - Who will do the mini consultations?	
FACILITY / EVENT SET-UP:	WHO:
Appetizers, drinks, set-up, decorating	
Sign in area, patient flyers, gift bags, display materials	
Consultation forms and quotes for exam rooms	
EVENT STRUCTURE:	WHO:
Welcome, credential practice/doctor, overview of the evening	
Presentation - Consultation in the round	
Physician Q&A	
Grand prize drawings	
Private mini consultations	
Payment deposits	
Door prizes throughout every 15 minutes	
Event clean up	
Thank you notes to all attendees post event	
Fill in event results form - For staff meeting next week	
Gather sign in sheet, copy of price quotes for file	