ENVITELY EVENT PLANNING CHECKLIST

Every task, in the right order, from kickoff to wrap-up.

Welcome

Thank you for downloading the Envitely Event Planning Checklist. This workbook gives you a complete, ready-to-use checklist of what needs to be done to plan a successful event — from the earliest strategic decisions through to post-event follow-up.

Purpose of This Template

To give event organisers a comprehensive, professionally written checklist covering every stage of planning, so you can start working immediately instead of building a checklist from scratch — while tracking priority, ownership and progress along the way.

Who It's For

This template is designed to work equally well for weddings, conferences, corporate events, universities and student unions, charity events, community events, networking events and private celebrations of any size.

What's Included

- Welcome & Guide — this sheet, with guidance and best practice tips.
- Event Planning Checklist — over 100 ready-to-use planning tasks across 12 categories.
- Checklist Dashboard — an executive summary with KPIs and charts, ready to present or print.

How to Use This Workbook

1. Open the Event Planning Checklist and review the pre-built tasks.
2. Remove any tasks that don't apply, and add your own where needed.
3. Set a target date for each task based on your own event date.
4. Assign an owner and priority to each task using the dropdown lists.
5. Update Status as you work through the checklist, and check the Dashboard for progress.

Planning Best Practices

- Start with the highest priority tasks in each category.
- Revisit Recommended Timing to build your own target dates around your event date.
- Review progress weekly as the event gets closer.
- Reassign tasks early if an owner becomes unavailable.
- Keep notes on each task so decisions aren't lost along the way.

Why Move Beyond Spreadsheets?

Spreadsheets are a great way to work through a checklist. But as your event grows, coordinating tasks, guests, budgets and your wider team benefits from one connected workspace — that's where Envitely comes in.

✓	Event Timelines	✓	Tasks
✓	Guest Lists	✓	Budgets
✓	RSVP Tracking	✓	Seating & Allocations
✓	Vendors	✓	Agendas
✓	Team Collaboration		

Ready to manage your entire event?

This template is designed to help you plan your event, but successful events need much more. With Envitely you can also manage:

- Event Timelines
- Tasks
- Guest Lists
- Budgets
- RSVP Tracking
- Seating & Allocations
- Vendors
- Agendas
- Team Collaboration

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EVENT PLANNING CHECKLIST

Over 100 professionally written tasks to guide your planning, start to finish.

Total Tasks	Completed	In Progress	Overdue	Completion %
113	0	0	0	0.0%

Task ID	Planning Category	Task	Recommended Timing	Assigned To	Priority	Status	Target Date	Completed Date	Notes
C001	Event Strategy	Define the event's purpose, objectives and desired outcomes	12+ Months Before		High	Not Started			
C002	Event Strategy	Identify the target audience and estimate expected guest numbers	12+ Months Before		High	Not Started			
C003	Event Strategy	Choose the event format — in-person, virtual or hybrid	12+ Months Before		High	Not Started			
C004	Event Strategy	Set the event date and check for conflicting events	12+ Months Before		High	Not Started			
C005	Event Strategy	Draft the initial event concept, theme and tone	12+ Months Before		Medium	Not Started			
C006	Event Strategy	Define success metrics and key performance indicators	12+ Months Before		Medium	Not Started			
C007	Event Strategy	Identify key stakeholders and decision-makers	12+ Months Before		High	Not Started			
C008	Event Strategy	Establish a project timeline with key planning milestones	12+ Months Before		High	Not Started			
C009	Event Strategy	Assign core planning team roles and responsibilities	9–12 Months Before		Medium	Not Started			
C010	Budget	Set the overall event budget	12+ Months Before		High	Not Started			
C011	Budget	Break the budget down by category (venue, catering, marketing, etc.)	9–12 Months Before		High	Not Started			
C012	Budget	Identify potential funding sources, sponsors or grants	9–12 Months Before		Medium	Not Started			
C013	Budget	Set aside a contingency fund of 10–15% of the total budget	9–12 Months Before		High	Not Started			
C014	Budget	Research typical costs for similar events	9–12 Months Before		Medium	Not Started			
C015	Budget	Set up a budget tracking spreadsheet or tool	9–12 Months Before		Medium	Not Started			
C016	Budget	Get budget sign-off from stakeholders	9–12 Months Before		High	Not Started			
C017	Budget	Set up a system for logging and approving expenses	6–9 Months Before		Medium	Not Started			
C018	Budget	Review actual spend against budget at the midpoint of planning	3–6 Months Before		Medium	Not Started			
C019	Venue	Create a shortlist of potential venues	12+ Months Before		High	Not Started			
C020	Venue	Check venue availability for the target date	12+ Months Before		High	Not Started			
C021	Venue	Arrange site visits for shortlisted venues	9–12 Months Before		High	Not Started			

Task ID	Planning Category	Task	Recommended Timing	Assigned To	Priority	Status	Target Date	Completed Date	Notes
C022	Venue	Confirm the venue's capacity meets expected guest numbers	9–12 Months Before		High	Not Started			
C023	Venue	Review the venue's accessibility features	9–12 Months Before		Medium	Not Started			
C024	Venue	Negotiate and confirm the venue contract	9–12 Months Before		High	Not Started			
C025	Venue	Pay the venue deposit	9–12 Months Before		High	Not Started			
C026	Venue	Confirm the venue layout and floor plan	6–9 Months Before		Medium	Not Started			
C027	Venue	Arrange parking and transport information for guests	3–6 Months Before		Medium	Not Started			
C028	Venue	Confirm the venue's insurance and liability requirements	6–9 Months Before		Medium	Not Started			
C029	Venue	Schedule load-in and load-out times with the venue	1–3 Months Before		Medium	Not Started			
C030	Guests & Invitations	Build the initial guest list	9–12 Months Before		High	Not Started			
C031	Guests & Invitations	Confirm final guest numbers with stakeholders	6–9 Months Before		High	Not Started			
C032	Guests & Invitations	Design the invitations	6–9 Months Before		Medium	Not Started			
C033	Guests & Invitations	Send save-the-date notices	6–9 Months Before		Medium	Not Started			
C034	Guests & Invitations	Send formal invitations	3–6 Months Before		High	Not Started			
C035	Guests & Invitations	Set an RSVP deadline	3–6 Months Before		Medium	Not Started			
C036	Guests & Invitations	Track RSVP responses as they arrive	3–6 Months Before		High	Not Started			
C037	Guests & Invitations	Follow up with guests who haven't responded	1–3 Months Before		Medium	Not Started			
C038	Guests & Invitations	Collect dietary requirements from confirmed guests	1–3 Months Before		High	Not Started			
C039	Guests & Invitations	Collect accessibility requirements from confirmed guests	1–3 Months Before		High	Not Started			
C040	Guests & Invitations	Confirm plus-ones and additional companions	1–3 Months Before		Medium	Not Started			
C041	Guests & Invitations	Prepare name badges or place cards	2–4 Weeks Before		Medium	Not Started			
C042	Guests & Invitations	Send joining instructions and event details to confirmed guests	2–4 Weeks Before		High	Not Started			
C043	Guests & Invitations	Prepare a final guest list for on-the-day check-in	1 Week Before		High	Not Started			
C044	Catering	Research and shortlist catering suppliers	6–9 Months Before		High	Not Started			
C045	Catering	Request catering quotes and sample menus	6–9 Months Before		High	Not Started			
C046	Catering	Confirm the catering supplier and final menu	3–6 Months Before		High	Not Started			

Task ID	Planning Category	Task	Recommended Timing	Assigned To	Priority	Status	Target Date	Completed Date	Notes
C047	Catering	Plan menu options for dietary requirements and allergies	3–6 Months Before		High	Not Started			
C048	Catering	Confirm catering timings with the venue	1–3 Months Before		Medium	Not Started			
C049	Catering	Arrange tableware, linens and glassware	1–3 Months Before		Medium	Not Started			
C050	Catering	Confirm final catering numbers with the supplier	2–4 Weeks Before		High	Not Started			
C051	Catering	Arrange beverage and bar service	1–3 Months Before		Medium	Not Started			
C052	Catering	Pay the catering deposit	3–6 Months Before		Medium	Not Started			
C053	Entertainment & Speakers	Identify entertainment or speaker requirements	6–9 Months Before		Medium	Not Started			
C054	Entertainment & Speakers	Research and shortlist entertainers or speakers	6–9 Months Before		Medium	Not Started			
C055	Entertainment & Speakers	Contact and confirm entertainment or speakers	3–6 Months Before		High	Not Started			
C056	Entertainment & Speakers	Confirm fees, contracts and cancellation terms	3–6 Months Before		High	Not Started			
C057	Entertainment & Speakers	Share the event brief and running order with performers	1–3 Months Before		Medium	Not Started			
C058	Entertainment & Speakers	Confirm technical requirements for performers	2–4 Weeks Before		Medium	Not Started			
C059	Entertainment & Speakers	Schedule rehearsal or sound check time	1 Week Before		Medium	Not Started			
C060	Marketing & Communications	Develop event branding and key messaging	6–9 Months Before		Medium	Not Started			
C061	Marketing & Communications	Create an event website or landing page	6–9 Months Before		Medium	Not Started			
C062	Marketing & Communications	Set up an online registration page	6–9 Months Before		High	Not Started			
C063	Marketing & Communications	Plan a social media promotion schedule	3–6 Months Before		Medium	Not Started			
C064	Marketing & Communications	Design promotional materials and graphics	3–6 Months Before		Medium	Not Started			
C065	Marketing & Communications	Draft a press release or media outreach plan	3–6 Months Before		Low	Not Started			
C066	Marketing & Communications	Schedule email marketing campaigns	1–3 Months Before		Medium	Not Started			
C067	Marketing & Communications	Prepare an event hashtag and social media assets	1–3 Months Before		Low	Not Started			
C068	Marketing & Communications	Monitor registration numbers and adjust promotion as needed	1–3 Months Before		Medium	Not Started			
C069	Suppliers & Vendors	Identify all required suppliers and vendors	6–9 Months Before		High	Not Started			
C070	Suppliers & Vendors	Request quotes from shortlisted suppliers	6–9 Months Before		Medium	Not Started			
C071	Suppliers & Vendors	Confirm and book all suppliers	3–6 Months Before		High	Not Started			

Task ID	Planning Category	Task	Recommended Timing	Assigned To	Priority	Status	Target Date	Completed Date	Notes
C072	Suppliers & Vendors	Review supplier contracts and terms	3–6 Months Before		Medium	Not Started			
C073	Suppliers & Vendors	Confirm supplier delivery and setup times	1–3 Months Before		Medium	Not Started			
C074	Suppliers & Vendors	Share venue access details and contacts with suppliers	1–3 Months Before		Medium	Not Started			
C075	Suppliers & Vendors	Confirm payment terms and deposits with suppliers	3–6 Months Before		Medium	Not Started			
C076	Suppliers & Vendors	Create a master supplier contact sheet	1–3 Months Before		Medium	Not Started			
C077	Suppliers & Vendors	Reconfirm all suppliers one week before the event	1 Week Before		High	Not Started			
C078	Equipment & Technology	Identify AV and technical equipment needs	3–6 Months Before		Medium	Not Started			
C079	Equipment & Technology	Book AV equipment and technical support	3–6 Months Before		High	Not Started			
C080	Equipment & Technology	Test microphones, screens and sound equipment	1 Week Before		High	Not Started			
C081	Equipment & Technology	Arrange WiFi and internet access for the venue	1–3 Months Before		Medium	Not Started			
C082	Equipment & Technology	Set up event registration or check-in technology	2–4 Weeks Before		Medium	Not Started			
C083	Equipment & Technology	Arrange power supply and extension cables	2–4 Weeks Before		Medium	Not Started			
C084	Equipment & Technology	Prepare backup equipment for critical technical items	1 Week Before		Medium	Not Started			
C085	Staffing & Volunteers	Determine staffing and volunteer needs	3–6 Months Before		Medium	Not Started			
C086	Staffing & Volunteers	Recruit event staff or volunteers	3–6 Months Before		Medium	Not Started			
C087	Staffing & Volunteers	Assign roles and responsibilities to staff	1–3 Months Before		High	Not Started			
C088	Staffing & Volunteers	Brief staff and volunteers on event day procedures	1 Week Before		High	Not Started			
C089	Staffing & Volunteers	Prepare staff schedules and shift times	1 Week Before		Medium	Not Started			
C090	Staffing & Volunteers	Arrange staff identification, such as badges or t-shirts	2–4 Weeks Before		Low	Not Started			
C091	Staffing & Volunteers	Confirm emergency contacts and first aid coverage	1 Week Before		High	Not Started			
C092	Event Day	Confirm the final run sheet and timings	Event Day		High	Not Started			
C093	Event Day	Set up signage and directional wayfinding	Event Day		Medium	Not Started			
C094	Event Day	Set up the registration and check-in area	Event Day		High	Not Started			
C095	Event Day	Brief all staff and volunteers before doors open	Event Day		High	Not Started			
C096	Event Day	Conduct a final walkthrough of the venue	Event Day		High	Not Started			

Task ID	Planning Category	Task	Recommended Timing	Assigned To	Priority	Status	Target Date	Completed Date	Notes
C097	Event Day	Test all AV and technical equipment before guests arrive	Event Day		High	Not Started			
C098	Event Day	Set up seating and table arrangements	Event Day		Medium	Not Started			
C099	Event Day	Manage guest check-in and welcome	Event Day		High	Not Started			
C100	Event Day	Monitor the event schedule and timings throughout the day	Event Day		High	Not Started			
C101	Event Day	Coordinate with suppliers and vendors on the day	Event Day		Medium	Not Started			
C102	Event Day	Manage any on-the-day issues or last-minute changes	Event Day		High	Not Started			
C103	Event Day	Capture photos and video content	Event Day		Medium	Not Started			
C104	Event Day	Oversee breakdown and venue clean-up	Event Day		Medium	Not Started			
C105	Post Event	Send thank-you messages to guests	After Event		Medium	Not Started			
C106	Post Event	Send thank-you notes to suppliers and vendors	After Event		Low	Not Started			
C107	Post Event	Distribute a post-event survey to attendees	After Event		Medium	Not Started			
C108	Post Event	Review event feedback and key metrics against goals	After Event		High	Not Started			
C109	Post Event	Reconcile the final budget against actual spend	After Event		High	Not Started			
C110	Post Event	Settle any outstanding invoices and payments	After Event		High	Not Started			
C111	Post Event	Share event photos and highlights	After Event		Low	Not Started			
C112	Post Event	Document lessons learned for future events	After Event		Medium	Not Started			
C113	Post Event	Archive event materials, contracts and supplier details	After Event		Low	Not Started			

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CHECKLIST DASHBOARD

An at-a-glance summary of your planning progress — ready to review or present.

TOTAL TASKS	COMPLETED	IN PROGRESS
113	0	0

NOT STARTED	OVERDUE	COMPLETION %
113	0	0.0%

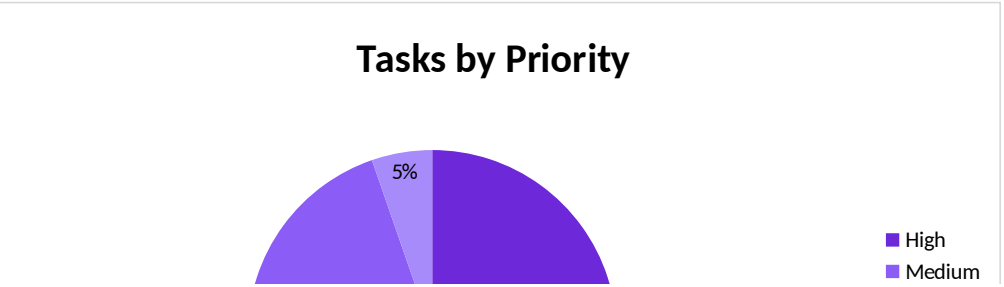
Tasks by Planning Category

Category	Count
Event Strategy	9
Budget	9
Venue	11
Guests & Invitations	14
Catering	9
Entertainment & Speakers	7
Marketing & Communications	9
Suppliers & Vendors	9
Equipment & Technology	7
Staffing & Volunteers	7
Event Day	13
Post Event	9



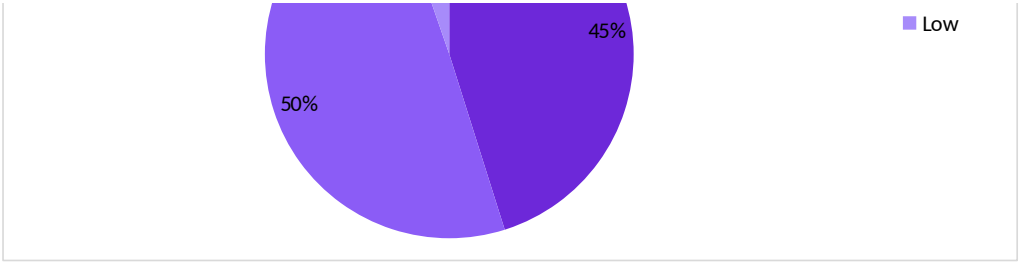
Tasks by Priority

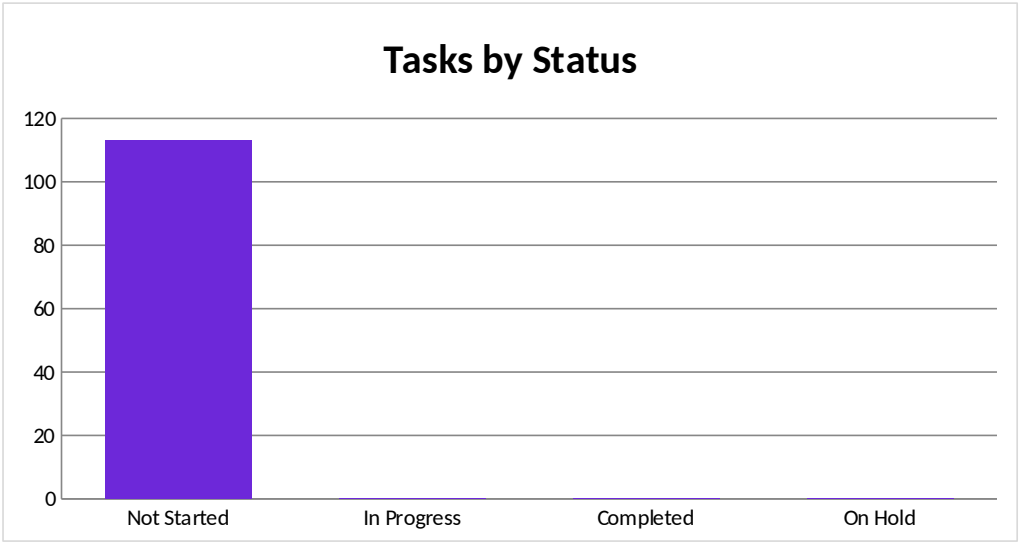
Category	Count
High	51
Medium	56
Low	6



Tasks by Status

Category	Count
Not Started	113
In Progress	0
Completed	0
On Hold	0


45%
50%
Low


Tasks by Status
120
100
80
60
40
20
0
Not Started
In Progress
Completed
On Hold