

Event Planning Checklist

The master checklist, phase by phase. Works for weddings, corporate events, and parties.

EVENT

DATE

LEAD TIME

OWNER

PHASE 1: FIRST DECISIONS

12 OR MORE WEEKS OUT

- Define the goal and how you will know the event worked
- Set the budget ceiling and a 10 percent contingency
- Pick the date and a backup date
- Draft the guest list and estimate the count
- Shortlist 3 to 5 venues and request pricing
- Decide who owns which decisions (you, client, committee)
- Open a single tracking document for every decision and payment

Notes:

PHASE 2: BOOK THE BIG THINGS

8 TO 12 WEEKS OUT

- Contract the venue and confirm what its fee includes
- Book catering and set the service style
- Book the key vendors: photo, music, rentals, florals as needed
- Get every vendor agreement in writing and signed
- Confirm insurance requirements with the venue
- Set the payment calendar for every deposit and balance
- Send save-the-dates if the event calls for them

Notes:

PHASE 3: DESIGN AND DETAILS

4 TO 8 WEEKS OUT

- Lock the theme, decor plan, and color decisions
- Send invitations and set the RSVP deadline
- Finalize the menu and bar arrangement
- Plan audio visual: mics, speakers, screens, playlists
- Order rentals: tables, chairs, linens, extras

Book staffing for setup, service, and teardown

Confirm dietary restrictions and accessibility needs

Notes:

PHASE 4: LOCK IT DOWN

2 TO 4 WEEKS OUT

Give the venue the guest guarantee before the deadline

Finish the seating plan

Draft the run of show and circulate it for comments

Reconfirm every vendor: arrival time, scope, contact

Make final payments on schedule

Build the day-of kit: tape, scissors, chargers, pens, meds

Notes:

PHASE 5: EVENT WEEK

THE FINAL DAYS

Confirmation call or text to every vendor

Final guest count to catering

Print the run of show and the contact sheet

Walk the venue one final time

Stage everything you are transporting yourself

Notes:

PHASE 6: EVENT DAY

Arrive first, walk the space against the run of show

Check in every vendor on arrival

Run the day from the run of show, one owner per cue

Capture photos of the setup before guests arrive

Close out: teardown, load-out, venue walkthrough

Notes:

PHASE 7: THE WEEK AFTER

Pay every remaining invoice

Send thank-yous to client, vendors, and helpers

Collect photos and add the best to your portfolio

Ask for the review and one referral introduction

Debrief: what drifted from plan, and fix the template

Notes:
