B2B event planning checklist

From 12 months out to the week after. Owner and date columns are yours to fill in. From EpochX: epochapp.com/epochx/blog/b2b-event-planning-checklist

12 to 6 months out

Flagship events, conferences and trade shows. A dinner or field event can start at three months.

	Task	Area	Owner	Due
☐	Write the event's job in one line: new pipeline, expansion or relationships	Goals and budget		
☐	Set the success bar before you commit to a room: what the event must return for what it costs *Why: Attribution was the most common pain in our conversations. The teams that had it working were not the best-tooled ones. They had decided what to count.*	Goals and budget		
☐	Agree with sales how pipeline will be counted, such as any opportunity with a contact who attended within an agreed window	Goals and budget		
☐	Find out who owns the budget and tool decisions, and when budget windows open *Why: Budget timing, a central purchasing process, an IT or AI review, or a company-wide freeze can each stall an event tool. Each one runs on a different clock.*	Goals and budget		
☐	Draft the budget with a contingency line	Goals and budget		
☐	Shortlist dates and venues, and check for clashes with your other events and the industry calendar	Venue		

6 to 3 months out

Lock the audience and the room.

	Task	Area	Owner	Due
☐	Build the target account list with sales from your ICP	Accounts and guest list		
☐	Write invite criteria: roles, seniority, account tiers and who to exclude, such as competitors *Why: Screening came up with 31 of the 108 teams we spoke with. The shared lesson: a smaller room of the right accounts beats a full room.*	Accounts and guest list		
☐	Decide who approves registrants, and how fast they must respond	Accounts and guest list		
☐	Book the venue and confirm capacity, AV, accessibility and catering minimums	Venue		
☐	Trade shows: confirm the organizer's lead retrieval options and any rules on third-party scanners *Why: Large shows can restrict which scanners you use or how you contact scanned attendees, and some shows offer no lead retrieval at all.*	Check-in and lead capture		
☐	Check regional consent rules for scanning and contacting attendees outside the US	Check-in and lead capture		

12 to 8 weeks out

Set up the systems before anyone is invited.

	Task	Area	Owner	Due
☐	Set up the CRM campaign, and agree which registration statuses sync and when *Why: One-way or broken CRM sync was the second most common pain. One team found a sync that fired on every registration edit had filled a year of reporting with duplicates.*	Pages and registration		
☐	Match the registration form's company field to CRM accounts, so self-typed company names still land on the right record	Pages and registration		
☐	Add the fields your report needs, such as customer, partner or prospect, to the registration form *Why: Teams told us they rebuild event reports by hand in spreadsheets, sometimes twice a week, because the breakdown they need was never captured.*	Pages and registration		
☐	Build a short event page: what it is, who it's for, when, where, why come, and register	Pages and registration		
☐	Test registration end to end: confirmation email, calendar file, CRM record and no duplicates	Pages and registration		
☐	Draft invitations: a marketing version, plus a personal version for sales and executive senders	Invitations and reminders		

8 to 2 weeks out

Fill the room with the right accounts.

	Task	Area	Owner	Due
☐	Send tier one invitations, then follow up with non-responders on a second channel	Invitations and reminders		
☐	Have account owners send personal invites to priority contacts	Invitations and reminders		
☐	Offer declined seats to the next tier and keep a waitlist	Invitations and reminders		
☐	Sponsored shows: plan for the organizer's list arriving late, and prepare outreach in advance *Why: Building the invite list by hand came up with more than a quarter of teams. At sponsored shows the list can arrive about two weeks before the event.*	Invitations and reminders		
☐	Draft the run of show and assign staff roles	Run of show		
☐	Assign a follow-up owner to every target account, and draft follow-up emails now *Why: Follow-up that never happens came up with 29 teams. One fix we heard: reps write their follow-up before the event and schedule it for the next morning.*	Follow-up and reporting		

Final week

Confirm people, brief the team, test the door.

Task	Area	Owner	Due
☐ Send the reminder with logistics and a calendar file	Invitations and reminders		
☐ Ask account owners to check in personally with their guests	Invitations and reminders		
☐ Brief staff and reps: who is coming, why, and what a good outcome looks like for each account	Run of show		
☐ Set up check-in with QR codes on a tablet or kiosk, and test it on the venue Wi-Fi	Check-in and lead capture		
☐ Agree how reps capture each conversation: a scan plus a short qualifier or note *Why: Getting reps to scan and log conversations is the hard part of onsite capture, and after a busy show there can be hundreds of records to work through.*	Check-in and lead capture		
☐ Confirm final headcount and dietary needs with the venue	Venue		

Event day

Let the team focus on people.

Task	Area	Owner	Due
☐ Check in every guest, including walk-ins, so attendance is recorded	Check-in and lead capture		
☐ Capture leads and notes at the booth or table while they are fresh	Check-in and lead capture		
☐ Run the agenda, with one person keeping time	Run of show		
☐ Debrief per account before the team leaves	Follow-up and reporting		

The week after

Turn conversations into next steps.

Task	Area	Owner	Due
☐ Send thank-yous within 24 hours, and a short note to no-shows	Follow-up and reporting		
☐ Account owners send personal follow-up within 48 hours	Follow-up and reporting		
☐ Sync attendance and notes to the CRM, and check for duplicates	Follow-up and reporting		
☐ Check that every target account has an owned next step, and chase the gaps *Why: One team stopped paying for badge scanning because sales never worked the leads. Capture without follow-up is hard to defend at budget time.*	Follow-up and reporting		
☐ Report accounts attended, follow-ups done, meetings booked and pipeline under the rule you agreed	Follow-up and reporting		
☐ Write down three things to change for the next event	Follow-up and reporting		