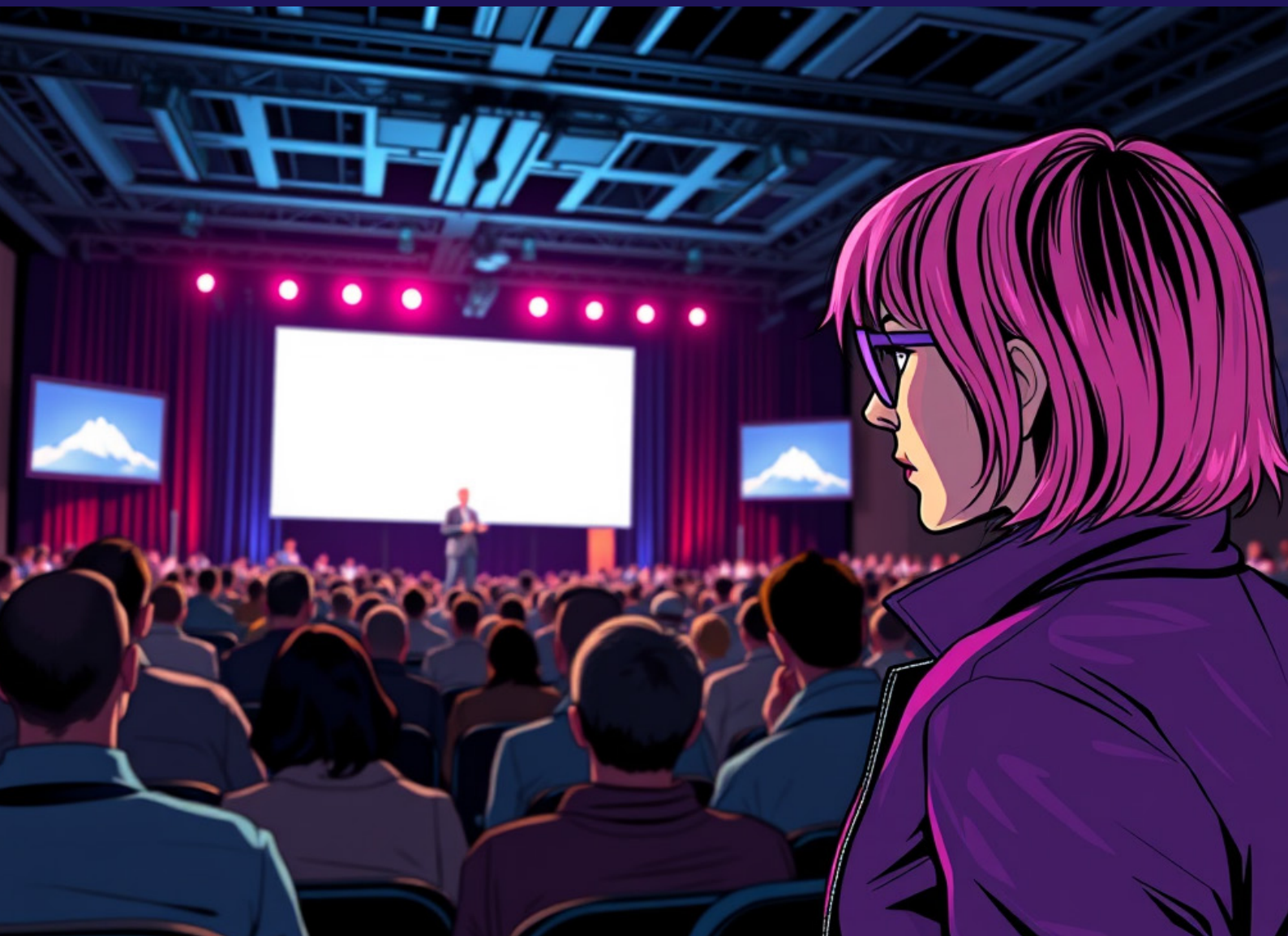


B2B Tech Event Manager Checklists

**Hosted Event Organization Checklist
for Organizing Your Own Seminars,
Webinars, and Conferences**



Phase 1: Strategic Concept Development (16-20 Weeks Before)

Event Selection & Objectives

- Define primary business objectives (education, relationship building, product launch, thought leadership)
- Select event format (breakfast seminar, half-day workshop, full conference, virtual/hybrid)
- Determine target audience size and segmentation
- Establish budget parameters and ROI expectations
- Choose event date considering industry calendar and competitor activities
- Secure executive sponsorship and cross-functional team support

Venue and Format Planning

- Research and select venue options (capacity, location, technology, accessibility)
- Negotiate venue contracts and terms
- Plan virtual/hybrid technology requirements if applicable
- Consider catering and hospitality requirements
- Evaluate parking, transportation, and accommodation options for attendees

Phase 2: Content Strategy & Speaker Development (12-16 Weeks Before)

Program Architecture

- Develop comprehensive agenda with session timing
- Plan content mix (70% educational, 20% customer stories, 10% company content)
- Design multiple tracks for different personas if applicable
- Create interactive elements (polls, Q&A, workshops, networking)
- Plan opening and closing sessions with clear calls-to-action

Speaker Recruitment and Management

- Identify and recruit external thought leaders and industry experts
- Develop compelling speaker value propositions
- Confirm customer speakers and success story presentations
- Create speaker agreement templates covering logistics and expectations
- Begin speaker briefing process with audience and messaging guidelines
- Coordinate travel and accommodation for external speakers

Phase 3: Marketing & Registration Development (8-12 Weeks Before)

Team Selection and Training

- Design event branding and visual identity
- Create compelling event landing page with registration functionality
- Develop multi-channel marketing campaign (email, social, partner networks)
- Create promotional content highlighting speakers and agenda value
- Design targeted outreach for different audience segments
- Integrate with CRM and marketing automation systems

Registration and Attendee Management

- Set up registration platform with qualification questions
- Create confirmation and nurturing email sequences
- Design reminder campaign schedule leading up to event
- Plan VIP invitation process for key customers and prospects
- Coordinate with partners for cross-promotion opportunities
- Establish waiting list management for capacity-controlled events

Phase 4: Production Planning & Team Preparation (4-8 Weeks Before)

Technical and Production Setup

- Confirm AV requirements and professional setup
- Test virtual/hybrid platform capabilities and integrations
- Plan recording and live streaming requirements
- Arrange professional lighting and camera setup
- Test backup systems and contingency technology plans
- Coordinate with venue on technical requirements and setup

Team Structure and Role Assignment

- Define organizational structure and key roles
- Assign registration and guest services team
- Designate technical support and production staff
- Identify content and speaker liaison responsibilities
- Select session moderators and facilitate training
- Plan social media and real-time content team

Content Finalization

- Conduct comprehensive speaker briefings
- Review and approve all presentation content
- Schedule and conduct technical rehearsals
- Prepare backup content and contingency presentations
- Create supporting materials and resource packages
- Design interactive technology setup (polling, Q&A systems)

Phase 5: Final Preparation & Logistics (1-4 Weeks Before)

Attendee Experience Preparation

- Create comprehensive attendee communication packages
- Develop clear logistics information (directions, parking, technology)
- Prepare welcome materials and information packets
- Plan networking facilitation and conversation starters
- Design feedback collection systems and surveys
- Create mobile event app or digital resource center

Operational Readiness

- Conduct full dress rehearsal with all speakers and technology
- Finalize catering arrangements and dietary accommodation
- Prepare registration and check-in procedures
- Test all lead capture and CRM integration systems
- Create emergency contact lists and contingency procedures
- Brief all team members on roles, procedures, and troubleshooting

Marketing and Communication Finalization

- Execute final registration push and reminder campaigns
- Prepare social media content calendar for event day
- Coordinate with speakers on their promotional activities
- Create press releases and media outreach if applicable
- Prepare post-event content and follow-up materials

Phase 7: Post-Event Excellence (1-6 Weeks After)

Immediate Follow-Up (24-48 Hours)

- Send thank-you messages to all attendees with personalized touches
- Deliver presentation materials and exclusive content as promised
- Provide professional recordings and session highlights
- Express gratitude to speakers with photos and feedback
- Conduct internal team debrief and collect lessons learned

Lead Management and Nurturing (1-2 Weeks)

- Qualify and segment all attendees based on interest and business potential
- Execute personalized follow-up campaigns for different attendee segments
- Schedule one-on-one consultations with high-value prospects
- Coordinate with sales team for hot lead handoffs
- Invite attendees to relevant upcoming events and webinars

Relationship Building and Community Development (2-6 Weeks)

- Create ongoing engagement opportunities for attendees
- Develop customer advisory panel invitations for key participants
- Facilitate peer connections between attendees with shared interests
- Launch follow-up content series building on event topics
- Plan next event in series or follow-up engagements

Performance Analysis and Strategic Planning

- Calculate comprehensive ROI including direct sales and pipeline creation
- Analyze attendee feedback and satisfaction metrics
- Document best practices and improvement opportunities
- Update event hosting strategy based on results and lessons learned
- Plan next hosted events incorporating insights and improvements

Key Success Metrics to Track:

- Registration and attendance rates
- Attendee engagement and satisfaction scores
- Lead generation quantity and quality
- Sales pipeline and revenue attribution
- Content consumption and sharing metrics
- Speaker performance and audience feedback
- Community building and ongoing engagement
- Brand awareness and thought leadership impact
- Customer relationship depth and loyalty
- Long-term business development outcomes

Additional Considerations for Both Templates:

Budget Management

- Track all expenses against approved budget
- Monitor cost per attendee/lead metrics
- Negotiate vendor contracts and payment terms
- Plan for contingency expenses (typically 10-15% buffer)
- Calculate total ROI including soft benefits

Legal and Compliance

- Ensure GDPR compliance for international attendees
- Secure appropriate insurance coverage
- Obtain photography and recording permissions
- Verify venue and vendor contract terms
- Address accessibility and safety requirements

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Sustainability and Corporate Responsibility

- Choose eco-friendly materials and practice
- Support local businesses and suppliers
- Provide recycling and waste reduction options
- Consider carbon offset programs for travel
- Create inclusive experiences for diverse attendees

Technology Backup Plans

- Test all critical systems multiple times
- Prepare offline alternatives for digital processes
- Have backup equipment for all essential technology
- Create communication plans for technical failures
- Train team on emergency procedures and alternatives

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