**Event Timeline Template**

**Summary**

An event operations timeline is the “playbook” of the entire event and is critical to keeping all stakeholders and team members on track. It is a chronological list of the tasks that need to be completed for your event.

Event operations timelines allow you to set deadlines and assign tasks. It is a master “to-do” list for your event. Once you create your timeline, share it and meet on a regular basis to ensure each item is completed on time.

**Best Practices in Event Timelines**

This sample timeline provides best practices in developing key milestone dates and more detail is necessary to add for your individual event.

It is important to:

1. Include actual dates for your event in the timeline
2. Assign all tasks to an individual/s
3. Share the timeline with team members meet regularly to discuss progress, checking off items as they are completed.
4. This is an important document—keep it updated and sharable

[**Customizable Timeline Template.xlsx**](Event%20SOPs%20Additional%20Resources/Customizable%20Timeline%20Template.xlsx)

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| **Time** | **Task** |
| **18 to 12 months out**  **PLACE ACTUAL DATES HERE** | Gather event stakeholders and outline event purpose, goals and objectives |
|  | Finalize event date/s with stakeholders |
|  | Select event type and develop event agenda / attendee experience—review with stakeholders |
|  | Create and finalize budget |
|  | Conduct site visits and contract venue |
|  | Begin sourcing event vendors (AV, décor, etc.) |
|  |  |
| **12 to 9 months out** | Refine event design and secure speakers, entertainment |
|  | Contract event vendors |
|  | Short-list solutions for attendee registration/ticket sales |
|  | Develop sponsorship packages and create target sponsor list |
|  | Create event marketing plan and distribute to stakeholders for feedback |
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| **9 to 6 months out** | Select registration vendor and write registration policies and procedures |
|  | Begin monthly budget meetings with stakeholders |
|  | Launch event marketing plan (teasers, save the date) |
|  | Finalize all vendor contracts / make deposits as necessary |
|  | Sponsorship sales |
|  | Write event contingency plan / secure event insurance |
| **6 to 3 months out** | Launch attendee registration and begin weekly registration updates to stakeholders |
|  | Execute event marketing plan and adjust if necessary |
|  | Refine and finalize event design and participant experience / conduct additional site visit if necessary |
|  | Finalize sponsorship sales (three months out) |
|  | Begin event volunteer recruitment or contract temporary labor if needed |
|  | Finalize stage and signage designs |
|  | Begin a list of host speakers/presenters and draft scripting talking points |
|  |  |
| **3 months to 1 month out** | Select menus and finalize room sets based on anticipated attendance |
|  | Write Group Resume and Event Specifications and Orders for the venue and each vendor (2 months out) |
|  | Place all final orders—signage, merchandise, supplies |
|  | Write on-site work plan with individual assignments and responsibilities; develop any training documents if needed |
|  | Write Event Emergency Plan |
|  | Finalize all scripting for stage time, announcements, etc. |
|  | Write event evaluation survey and distribute to stakeholders |
|  |  |
| **Month of the event** | Conduct on-site meeting and event walk through with venue and necessary vendors |
|  | Conduct briefing calls with keynotes, panelists or other session speakers |
|  | Conduct briefing calls with all sponsors and send final on-site details in writing |
|  | Confirm entertainment details and requirements |
|  | Update and send Event Specifications or Orders if necessary |
|  | Ship items to venue if needed (no more than 2 weeks out) |
|  |  |
| **Week of the event** | Conduct a team meeting to review the on-site workplan |
|  | Confirm and communicate final food and beverage catering guarantees |
|  | Send a “What to Know Before You Go” communication to all registered attendees with key pieces of information for the event |
|  | Confirm all event supplies, shipments and signage have arrived |
|  | Hold pre-event (pre-con) meeting with venue to review Group Resume and Banquet Orders, correct as necessary |
|  | Conduct rehearsals as necessary |
|  |  |
| **Post-Event 1 week to 30 days post event** | Receive and review final invoices from venue and all vendors; make corrections as necessary |
|  | Run final registration reports |
|  | Send evaluation survey to attendees / evaluate results |
|  | Final budget reconciliation |
|  | Review event with sponsors for feedback |
|  | Send thank you letters to all presenters and those who supported your event |
|  | Conduct an internal review of venue and vendors |
|  | Pay final invoices |