



Event checklists

These checklists are meant to be a helpful guide through each transition in your event planning process.

Pre-event checklist

PRO TIP

To build a healthy company user group at your organization, we suggest hosting consistent events – for example, the first Friday of each month or once a quarter. When possible, build out a roadmap of events in advance. We've seen that consistency helps members feel connected and increases overall engagement.

Event objectives and logistics

- What is the purpose of the event?
- Who is your audience? What are there expectations and how will you try to meet them? What isn't within scope?
- What will success look like?
- When will the event take place?
- Where will the event take place?
Will it be in-person, virtual or a both?
- If it's a virtual or hybrid event, which platforms will you use to support your event?
- How many people are expected to attend?
- Who are the core team that will make the event happen? Are you handling it alone or will you have a team?
- What budget is available for the event?
Do you need to find additional funds?

Team and task delegation

- Identify your team
- Connect with your team to discuss topics that may be useful within your organization
- Allocate specific tasks, roles and action items as required
- Define key milestones and deadlines
- Build out processes, including communication, reporting, and meetings

4-6 weeks prior to event



Establish event essentials

- ☐ Set a date and time while considering how the date fits into attendees' schedules
- ☐ Book a meeting space
- ☐ Set event goals and think about ways to maximize learning
- ☐ Decide on the event name
- ☐ Define your event structure and agenda
- ☐ Consider delivery, engagement and room layout
- ☐ Provide speakers with details and guidelines on the specifics of their session and set deadlines for any content
- ☐ Collect presenter bios and headshots in advance
- ☐ Create the agenda for your event
- ☐ Include background descriptions for speakers
- ☐ Include the aims of your event and what attendees can expect to take away from it
- ☐ Book meeting space
- ☐ Check space accommodations (A/V options, space limitations, etc)

1-3 days prior to event



Bring it all together

- ☐ Consider an icebreaker or engagement game
- ☐ Send a courtesy message to speakers, reminding them of your upcoming event and their commitments

On-site setup/during event



Today's the day!

- ☐ Confirm WiFi name/password
- ☐ Test A/V equipment
- ☐ Registration: have a sign in sheet ready for attendees to check-in
- ☐ Host your event and take photos
- ☐ Have fun!

Share and promote your event

Share calendar invite, inclusive of your agenda with your target audience

Leverage existing communication channels to promote your event (instant messaging channels, team meetings, internal newsletters, etc.)

Consider creating a dedicated communication channel to promote the event (i.e. Company User Group Slack channel)



Post-event checklist

Congrats, your event went off without a hitch!
You're not done yet though, here are the items
to check off post-event:



- ☐ At the end of the event, get copies of final presentations (there may have been changes made on-site), data from event tech, etc.
- ☐ Coordinate your post-event emails and communications. Notify attendees of the post-event survey and where to access the resources as promised at the event
- ☐ Be sure to thank speakers and performers and to share any follow-up information, such as session feedback and images
- ☐ Coordinate thank you cards and gifts, as appropriate
- ☐ Take time to debrief with your team; talk about what went right, and what can be improved
- ☐ Share your learnings by writing a post-event summary in the Atlassian Community

Notes
