

PRE-EVENT CHECKLIST

Client: _____

Event Date: _____

DONE	TASK/ITEM	RESPONSIBLE	TIMELINE	ACTUAL DATE
	Send Client Form for Speaker Agreement info	Speaker	As soon as negotiated	
	Agreement, Invoices Created	Admin	As soon as Form is received	
	Connect with Event Contacts and Committee members on LinkedIN	Speaker	As soon as Possible	
	Client Agreement, Invoices sent to Speaker to approve before sending to the client	Admin	As soon as Created	
	Send Client Agreement, Invoices, W9, Credit Card Form	Admin	As soon as Created	
	If Client signed Agreement is not received within 1 week— Admin follow up	Admin	Dependent on Client	
	Signed Agreement received, forward to Speaker, set up Google Drive folder	Admin	Dependent on Client	
	Admin verifies with Client as to how Deposit Payment will be sent (if not in email) and timeline	Admin	After agreement is received	
	Follow up on Payment if not Received? If not- ask for status?	Speaker/Admin	Checks- 1 month, Credit Cards- 2 weeks from contract signed	
	Send Client Pre-Event Promotional email template	Admin	After payment is received	
	Pre-Event Video requested -send video request webform link to client to submit	Admin	After payment is received	
	Pre-Event Video Shot and edited and sent to client	Speaker	7-10 days after webform received	
	Pre-purchase of books? (Check contract) and send reminder to execute clause	Admin	6 weeks before	
	Send final invoice confirm due 30 days prior to event date (check contract first)	Admin	5 weeks before	
	Schedule pre-event conference call between Client and Speaker, Ask for a copy of the agenda/program (draft ok) to confirm schedule before booking travel	Admin	1 month before	
	Receive Agenda add to Client Google drive folder	Admin	1 month before	
	Book Travel (check agenda, contract and calendar)	Speaker	1 month before	
	Confirm hotel room (especially if client provides)	Admin	2 weeks before	
	Forward flight itinerary to Client (WITHOUT SEAT and Receipt INFO)	Speaker	1 week before	
	Ship books	Admin	1 week before	
	Confirm Travel/Logistics form and send to Speaker	Admin	1 week before	
	Send client by email deliverables	Admin	DAY of event	
	Reminder after Event- letter of recommendation	Admin	1 week after	
	Remind Speaker to ship Thank you Package (status of testimonial)	Admin	2 weeks after	

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