



**MAKING CONNECTIONS
SHAPING SOLUTIONS**

Your partner in creatively solving problems and
delivering a successful event

Event Strategy Worksheet

Make your events more strategic. You'll have more focus and direction if you answer the questions in this worksheet before you start planning your next event.

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Why do you want to hold an event? Do you want to instruct/guide? Introduce an idea? Celebrate, entertain, build relationships, raise funds?

What are the overall business goals you want to achieve? Review your company mission, vision, values, and any brand elements critical to the event.

What audience do you want to reach? Describe its qualifying characteristics. Consider characteristics such as gender, age, employment status (C-suite, blue collar, early entries, stay-at-home), and personal attributes.

How will event expenses be covered? Will you need to recruit sponsors? Will you charge an admission or other fee? Does the event need to make or raise money?

How many audience members do you want to draw? Why?

Who are the stakeholders that will be involved? Will you have a planning committee? What role, if any, might staff, sponsors, exhibitors, volunteers play? Estimate how many people in each category might be involved.

What do you want your attendees to experience? How do you want them to feel during the event? Describe an event similar to what you'd like to hold.

What don't you want at your event? For example, no "vendor blender," social hour, door prizes. Share any time/date/location restrictions.

When would you like to hold the event? Consider time of day and day of the week. Is it held on a weekend, full business day, school holiday? Is it a morning or evening event?

How will you define success? Is it by the number of attendees? Behavior change? Income raised by the event? Survey results? Business leads gained?

Have you held or attended a similar event? Reviewing other events can help you imagine new ones.

What's next? Use responses from this worksheet to develop an event outline and a preliminary budget. Review: Does the event outline fit business goals? Can it be executed? Are any adjustments needed to the budget, goals, or tactics? After the event is approved to go, then identify and clarify what is needed to execute the event: marketing strategy; timelines; roles and responsibilities of team members and volunteers; etc.

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