**Networking event planning checklist**

Hosting a successful event, whether virtual or in-person, requires purposeful action. A little effort on the front end can yield favorable results in the long run. Focus on these four steps to create the type of event you want with the participation you desire.

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| **Plan** |
| **Tasks** | **Tips** |
| * **Define objectives**
 | * Who do you want to gather?
* What do you want to accomplish?
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| * **Prepare an agenda and consider a possible theme**
 | * Focus on your objectives
* Virtual or in-person format?
* Educational program or participant conversation?
* Add pizzaz with a theme - fit to group and align with objectives
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| * **Identify who to invite**
 | * If one of your objectives is to have a meaningful conversation with your guests, limit the number of people (8-10) to give each participant enough time to speak and comfortably interact with others
* Identify those who would be interested in the agenda who can benefit from networking with one another
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| * **Create an event budget**
 | * Determine the funding needed to support your event
* Virtual events: Consider costs of mailing gifts
* In-person events: Consider costs of venue, food and beverage
 |
| * **Select a date and time**
 | * Select a date that gives invitees advance notice (6-8 weeks prior is recommended)
* Virtual events:
* Consider your invitees’ time zones
* 60-90 minutes in length is recommended
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| * **Select a virtual platform or in-person venue**
 | * Virtual events:
* Consider using a platform commonly used by you and your invitees
* Keep in mind special features such as polls or breakout rooms that you want to utilize
* In-person events:
* Find a space suitable for the theme, agenda, budget and expected number of attendees
* If your office can’t meet these requirements, consider asking a client or your state society to use their space, or consider local restaurants or hotels.
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| * **Provide gifts, food and beverage** (optional)
 | * Select items related to the theme from a client or local vendor
* Virtual events: Consider a logoed coffee cup from your firm, snack mix, or other items easily shipped to attendees
* In-person events: If not at your office, consult with the venue’s food and beverage manager. If food is not available through the venue, consider a using a client’s business or local food truck or catering company.
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| * **Name host** (if not yourself)
 | * Emcee for the event - sets warm and welcoming tone
* Ensures everyone is heard and is unbiased and objective
* Starts and ends on time and keeps things on track
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| * **Prepare for event**
 | * Prepare talking points in advance
* Create slides and polls you plan to use
* Test audio and video
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| **Communicate** |
| **Tasks** | **Tips** |
| * **Create the invitation**
 | * Set the tone with an attention-grabbing invitation
* Incorporate any theme with enticing graphics and text
* Add important details – what, where and when
* Add a link to a group space (details below)
* Include a feature so invitees can easily RSVP and post directly to their calendar
* Send invites 6-8 weeks prior to the event
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| * **Communicate event details and add documents in a group space**
 | * Use shared space technology (i.e. Microsoft Teams, SharePoint, Google Drive) to create a central location for easy communication and document sharing
* Include important documents such as the agenda and RSVP list
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| * **Be clear about expectations**
 | * Clearly define participant expectations
* Offer tips on what participants can do to prepare
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| * **Send reminders**
 | * Build interest with regular, upbeat and easy to follow reminders – no more than once per week
* Send last minute details to registered attendees on the day before the event
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| **Orchestrate, connect and engage** |
| **Tasks** | **Tips** |
| * **Welcome**
 | * Help people feel welcome and appreciated for joining
* Virtual events:
* Open the event 5-10 minutes before the scheduled start time
* The host and other firm members should greet everyone as they enter
* In-person events:
* Have a check-in area to confirm attendance and provide name tags
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| * **Opening remarks**
 | * Outline objectives, agenda and expectations
* Virtual events: Review tech tips and how to use features such as polls, chats and breakouts
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| * **Introductions**
 | * Prompt participants on items to include in their introduction
* Let them know how long they should speak
* To set the tone, the host should make the first introduction
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| * **Program**
 | * If your event features a program, introduce this segment and the presenter
 |
| * **Conversation**
 | * Outline how participant discussions will be facilitated
* Encourage questions and comments – prepare a few questions if participants are slow to ask
* Work to engage everyone and keep the conversation moving
* Initiate discussion yet remain neutral and unbiased to make everyone feel accepted
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| * **Wrap up**
 | * End on time with a positive note
* Summarize comments and tie them back to objectives
* End with a call to action such as encouragement to connect on social media to continue the conversation
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| **Follow up and collaborate** |
| **Tasks** | **Tips** |
| * **Follow up**
 | * Send an email to thank everyone for their participation
* Summarize important talking points and highlights
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| * **Connect on social media**
 | * Encourage participants to connect and continue the conversation
* Send a message to those with complimentary practices or mutual clients
* Extend an invitation to follow your firm on social media
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| * **Look for opportunities to collaborate or refer business**
 | * Challenge participants to look for opportunities to refer and collaborate
* Do you have clients that could benefit from the expertise of anyone at the event?
* Is there an opportunity for someone from the event to speak at an upcoming webinar or write an article for a firm newsletter or blog?
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