sme membership
learn. engage. advance.

SME Chapter Event Planning Checklist

1. Event Basics

- ☐ Define the event objective (fundraising, networking, awareness, recruitment)
- ☐ Choose an event format (in-person, virtual, hybrid)
- ☐ Identify target audience (members, sponsors, students, partners)
- ☐ Set a date and time
- ☐ Create a budget
- ☐ Let SME Membership (chapters@sme.org) know about the event and request any assistance
- ☐ Visit the SME Chapter Toolkit to find information and materials to help plan the event

2. Venue & Logistics

- ☐ Secure venue or virtual platform (consider capacity, AV needs, accessibility)
- ☐ Sign venue agreement (if applicable)
- ☐ Arrange catering/refreshments (if needed)
- ☐ Set up registration system (Eventbrite, Evite, Google Forms, Microsoft Forms)
- ☐ Set up a volunteer sign-up system (Sign-Up Genius, Google Forms, Microsoft Forms)
- ☐ Plan for signage, name badges, materials
- ☐ Assign on-site roles (greeter, tech lead, timekeeper, photographer)

3. Marketing & Promotion

- ☐ Find your Chapter logo to use on all marketing/promotional items
- ☐ Create event flyer or digital invite
- ☐ List event on SME chapter page or shared calendar
- ☐ Promote on LinkedIn, email list, SME member newsletters
- ☐ Order items from SME Store for branded items or promo gear
- ☐ Schedule social media countdown/reminders

4. Speakers & Sponsors

- ☐ Confirm guest speakers/panelists and send calendar invites
- ☐ Prepare speaker bios and event agenda
- ☐ Draft sponsorship pitch email or packet
- ☐ Reach out to potential sponsors (local businesses, partner orgs)
- ☐ Confirm sponsor benefits (logo placement, table, speaking slot)
- ☐ Collect sponsor logos and links

5. Communication & Coordination

- ☐ Send event confirmation and reminders to registrants
- ☐ Prepare a day-of schedule and assign roles

☐ Communicate roles and expectations to volunteers/team
☐ Test tech setup (Wi-Fi, projectors, microphones, Teams/Zoom links)

6. Post-Event Follow-Up

☐ Thank speakers, sponsors, and attendees
☐ Share event photos or highlights on LinkedIn, chapter site, chapter newsletter
☐ Send a post-event survey for feedback
☐ Schedule and host event debrief
☐ Document lessons learned and save for future planning
☐ Update chapter activity tracker/report
☐ Enter all expenses and income into budget and analyze
☐ Send SME Membership (chapters@sme.org) a follow-up email with photos and information to be shared