

A large white graphic of an event badge with a circular hole at the top, centered behind the main title.

ULTIMATE TOOLKIT FOR EVENT ORGANIZERS

A white rounded rectangular box containing the descriptive text.

21 tools you need to plan, organize, market,
and engage your audience at events

A dark orange triangle pointing upwards, located in the bottom right corner of the page.



Events are one of the best ways to bring together individuals from all walks of life! To be part of a community who share the same interests, where people can feel belonged.

But organizing, marketing, and hosting events are no mean feat.

After working with more than 100,000 events worldwide, we've come up with the ultimate toolkit for event organizers to be more strategic with their event planning and execution.

We have broken the process down into different stages of event planning; each stage comes with its own tips and resources.

To ease budget constraints, we've also curated tools that are free or are value for money. Enjoy the read!



This toolkit includes:

- 3** steps to get started on your event!
- 4** steps to budgeting like an event pro,
- 3** tips for reaching out for sponsorship,
- 5** things to look out for when choosing your venue,
- 5** types of venues to consider for your events,
- 4** guidelines when planning your operations checklist,
- 5** common issues at events and how to resolve them,
- 6** miscellaneous considerations for a successful event,
- 5** ways to leverage social media to promote your event,
- 3** steps to setting up ROI for your social media campaign,
- 3** ways to engage with attendees at the event and,
- 21** tools that will see you through every aspect of the event

Get Started

- 3 steps to get started on your event **Page 5**

Prepare a Budget

- 4 steps to budgeting like an event professional **Page 7**
- 3 tips when reaching out for sponsorship **Page 8**

Venue Selection

- 5 things to look out for when choosing your venue **Page 10-11**
- 5 types of venues to consider for your events **Page 12**

Planning & Operations

- 4 guidelines when planning your operations checklist **Page 14**
- 2 free tools for top notch teamwork **Page 15**
- 5 common issues at events and how to resolve them **Page 16-17**
- 6 miscellaneous considerations for a successful event **Page 18**

Marketing: Get your event shared

- 5 ways to leverage social media to promote your event **Page 20**
- 3 steps to measuring ROI for your social media campaign **Page 21**
- 7 tools for online marketing campaigns **Page 22**

Event Engagement

- 3 ways to engage with attendees at the event **Page 24**

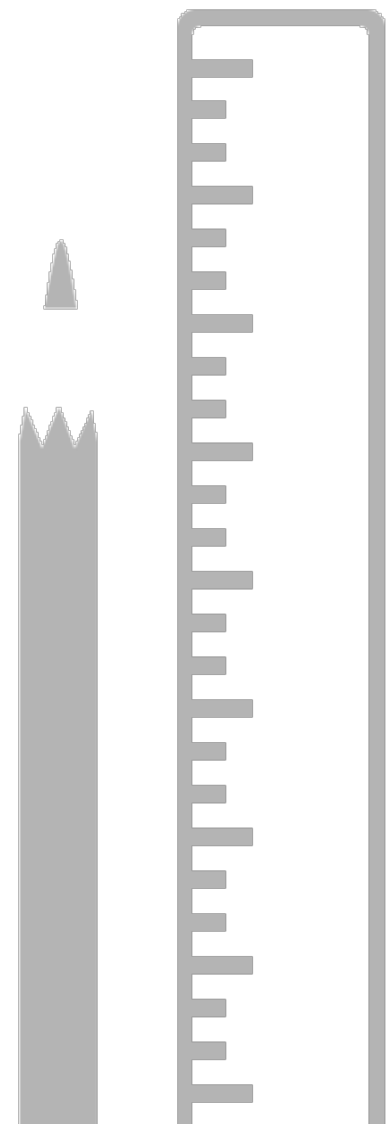
Post-event

- After-event follow up **Page 26**

Conclusion & Additional Resources

- 21 tools to make event organizing easier **Page 28**

Get a free 10 minute demo on managing your event. [Find out more.](#)



Get Started

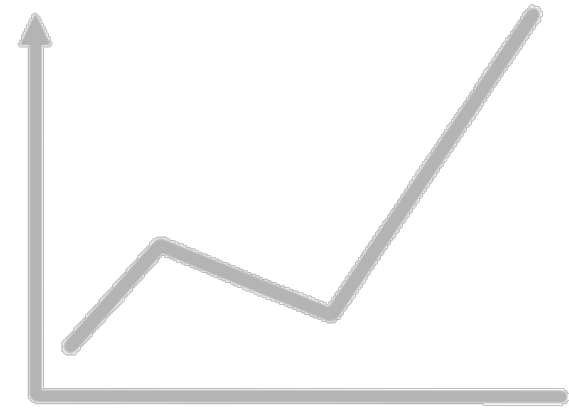
YOU HAVE AN IDEA AND YOU ARE NOW READY TO BRING IT TO LIFE! BUT HOW DO YOU BEGIN THIS PROCESS AND ENSURE THAT YOU MEET THE OBJECTIVES OF YOUR EVENT?

3 steps to get started on your event!



Step 1: Define Your Event Purpose

Ask yourself “What is the purpose of this event? Who am I doing it for?”
Narrow it down as much as possible; think of it as your mission statement.
When you know exactly what you want to do, it is a lot easier to do it!



Step 2: Set Event Goals

What exactly do you want to accomplish with this event? This should be a strategic goal. Is your goal to build more awareness of your business or cause amongst a particular demographic? Would it be to have 100 new customers as a result of the event? Or to raise \$10,000? Depending on your goal, you should define and set up ways to collect quantitative or qualitative data (e.g. a survey form, Google Analytics tracking links) to be analyzed post-event to establish your event’s success.

Step 3: Ideate!

Now that the goals have been set, get creative and ideate ways to organize an event that will meet those goals. It is important that you understand your event’s target audience (i.e. define demographic, outline a typical day in their life, consider their goals and challenges); it will help you figure out what they will value in attending an event and keep ideas focused in defining next steps – the theme, venue, event program, speakers or vendors to invite, right down to food and music!



Pinterest: A visual discovery tool that you can use to find ideas for all your projects and interests.



Niice.co: Instantly search the best design resources. Quickly collate and save images that inspire you. Painlessly create and export beautiful moodboards.



Budget

IMAGINE: YOU ARE DOING UP YOUR FINANCES AFTER THE EVENT AND REALIZE YOU HAVE SPENT BEYOND YOUR BUDGET.

NOW, LET'S KEEP THAT FICTION WITH A BALANCED BUDGET.

4 steps to budgeting like an event professional

1

Calculate all possible expenses. It is better to err on the side of caution and estimate costs to be 10% higher.

2

Estimate all possible income other than ticket sales like merchandize and in-kind and cash sponsorship.

3

Determine the minimum price per ticket:

- Estimate the number of attendees your event will draw within each ticket category.
- Deduct total estimated income from expenses to determine how much money you will need to attain break-even (i.e. no monetary loss or gain from your event).
- Use the above two data points to determine the minimum price for each ticket category.

4

Consistently review your expenses to ensure you are staying within budget. **Expensify** is a useful app to scan all receipts and keep your accounting in order.

Event Budget for [Event Name]			
Expenses			
		Estimated	Actual
Total Expenses		\$700.00	\$300.00
Site	Estimated	Actual	
Room and hall fees	\$500.00		
Site staff			
Equipment			
Tables and chairs			
Total	\$500.00	\$0.00	
Decorations	Estimated	Actual	
Flowers	\$200.00		\$300.00
Candles			
Lighting			
Balloons			
Paper supplies			
Total	\$200.00	\$300.00	
Publicity	Estimated	Actual	
Graphics work			
Photocopying/Printing			
Postage			
Total	\$0.00	\$0.00	
Miscellaneous	Estimated	Actual	
Telephone			
Transportation			
Stationery supplies			
Fax services			
Total	\$0.00	\$0.00	
Refreshments	Estimated	Actual	
Food			
Drinks			
Linens			
Staff and gratuities			
Total	\$0.00	\$0.00	
Program	Estimated	Actual	
Performers			
Speakers			
Travel			
Hotel			
Other			
Total	\$0.00	\$0.00	
Prizes	Estimated	Actual	
Ribbons/Plaques/Trophies			
Gifts			
Total	\$0.00	\$0.00	

Download your free event budget template:

tidyforms



3 tips when reaching out for sponsorship



Know why companies sponsor

Different companies sponsor for various reasons – to increase brand awareness, loyalty, drive traffic, or assume community responsibility. It is your duty to research before meeting them so that you can offer them value for being a part of your event. Build relationships with your sponsors so that you can understand their needs better, and serve them accordingly.

Know what sponsors want and expect from events

Some sponsors may demand category exclusivity (e.g. the only media sponsor), access to mailing list/database, presence in your online/offline collateral, or even ad placement in the program book. The amount they are willing to sponsor hinges on what they can receive in return. You can choose to break down the sponsorship into different tiers, and give them varying options of what they will receive in each tier. This gives them flexibility to choose what works best for them.

Draft the different tiers of sponsorships for your event

Based off what you know of your sponsors, outline sponsorship packages to define what a sponsor will receive in exchange for cash or in-kind sponsorship. You can get creative and go beyond offering an in-event or social media shoutout. (Read 10 creative opportunities for sponsorship you can provide at your event to amplify the logo, sell fan engagement, or elevate your sponsor's presence).

Pro tip: Cash sponsorships tend to require a longer period to acquire (at least 6 months) because actual budgets are involved.

Venue Selection

A VENUE WILL DETERMINE THE VIBE OF THE EVENT,
LOGISTICS NEEDED, NUMBER OF ATTENDEES, AND FOOD
CATERED.

PICK WISELY.

5 things to look out for when choosing your venue

1 Budget!

Set your budget and look for venues within it. A common rookie mistake is to set up appointments at potential venues without checking from the get-go if the venue will be within budget. Venues present one of the largest overhead costs and it is very easy to overspend in this department.

2 Set the date

When choosing a date for the event, check if it clashes with any of the major events in your industry. Typically, it is more expensive to book venues over the weekend, so you might want to consider setting your event on a weekday.



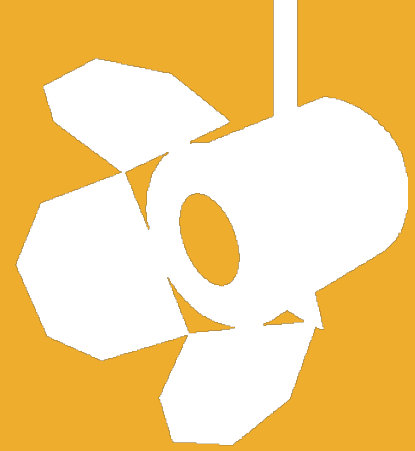
3 Venue Location

Accessibility to your event space is a crucial factor in determining if attendees will be willing to attend. Venues should be in a central location, easily accessible for attendees via public transport, and one which does not involve long commute time.

4 Ambiance & Amenities

Creating the right mood for your event will play a role in shaping the experience for attendees. If you are aiming for a casual event, hosting it in a hotel seminar room might not be the best option.

Check with the venue on amenities covered in the agreement – from lighting effects, sound equipment to stage setup. This can help determine if you need to budget for an external vendor to provide logistics not provided for by the venue.



5 Food & Catering

If you are serving food at your event, you can choose to host it at a venue that does F&B services like a café or a bar. If the venue itself does not provide food, but allows you to cater food, check their terms and conditions. Some venues will require you to order from the list of caterers they work with.

When you are setting up the registration form, you might want to ask attendees about their dietary preferences so you can make the necessary orders with your caterer.



5 types of venues to consider for your events



Co-working spaces are an excellent space to host casual meet ups and workshop sessions.



Cafes and bars provide a more intimate vibe and easy access to food and drinks. Ideal for small sessions with a casual vibe.



Hotel seminar rooms & ballrooms can be chosen for formal events or seminars.



Go **outdoors** to inject a breath of fresh air into your event. Perfect for nightlife, lifestyle or sporting events.



Offbeat venues like an indie cinema, a heritage site, or an abandoned space will be perfect for avant-garde events.

Tools for venue discovery:

Unique Venues and **Venuerific** are trusted sites for event venues in the US and Asia respectively. Discover all sorts of event venues on them!



Planning & Operations

NOW THAT YOUR EVENT PROGRAM AND VENUE HAVE BEEN DECIDED, HONE IN ON THE OPERATIONAL DETAILS.

4 guidelines when planning your operations checklist



Your event's operational checklist should include detailed information on the tasks required to successfully organize the event. Allow your team the creative freedom to manage various aspects of your event, and guide when necessary to achieve your event's goals as defined earlier.

What - the tasks that must be undertaken

Break down your event's checklist to outline tasks to be done before, during, and after an event. These tasks could include managing venue, catering, marketing, merchandize production, and so on depending on the needs of your event. Work with your team to spell out specific and measurable goals.

When - the timelines for task completion

Certain tasks will be time-sensitive, others, not so much. Prioritize tasks and set datelines. For example, if you know you typically need a month to promote your event for a good turnout, you should lock down event details like venue and speakers or performers at least five weeks prior to the event date.

Who - the persons responsible

Get everyone on board with your event's purpose and goals, and clarify any questions they have. It's important that your team is on the same page and are aware of their role, respective tasks, and deadlines. Establish a system to keep track of progress (find tools to help with this on the next page of this guide).

How Much - financial resources allocated

Keeping within budget is a crucial to the feasibility of running an event. Each team should be aware of the event budget allocated to a task so that they can work towards delivering the best experiences with the resources available.

2 free tools for top notch teamwork



Basecamp is a simple to use project management software available on web and mobile. You can use it to track your task progress, assign tasks to your team, share files, and receive email notifications. For single projects, you can also use it for free.



Asana seamlessly integrates project management and task management, among any sized team. It is very helpful for both the big picture task management view, as well as in narrowing down on details. Available on web and mobile, Asana also has a free tier.

5 common issues at events and how you can resolve them with one solution



Long queues at registration

One of the most common problems at events is the long queues at registration. Registration kickstarts your attendee's experience at an event, and it could make or break your event's first impression. How can you make this process more efficient?

Scanning of electronic QR code tickets quickly gets attendees through the door, or try **ColorSync**, a patented check-in technology that automatically validates an attendee's ticket if it flashes the same color as the organizer's check-in screen. A faster and more fun way to lift up anyone's mood even before your event begins!

Filling up seats, selling out tickets

Having a sold out, well attended event is top of mind for any event organizer. After all, you've most likely put in all that effort in organizing an event to share an interest with other like-minded folks! You want more people to find out about your event, you want more ticket sales. On Peatix, we place emphasis on getting events discovered through our platform via recommendation and discovery features that's brought about 20% of all ticket sales! That's one out of every five tickets sold. How? By being highly targeted. [Learn more.](#)

Engaging your audience between events

Your event may be annual, monthly, weekly, or be even more frequent than that. Whatever the timeline between events, it is important that you continue to engage with your previous and potential attendees so your event feels more like an active community and less like a once-off sale to attend, and when the time comes to promote your next event, you'll find it'll be easier to capture their interest because you've been genuine in building a relationship with your community.

Building a digital community, like hosting a group on Peatix, can help you with that. Anyone interested in your group can join, and people who purchase tickets to your event automatically join your group (unless they opt out). This means only people who are interested in the kind of events you run are a part of your group! Whenever you create a new event, members of your group will be notified. This targeted notification increases the likelihood of ticket purchase.

5 common issues at events and how you can resolve them with one solution



Not knowing your audience well

Have you ever ran an event and realized after that it would have been good to have collected some basic attendee information like demographic and contact details to know your audience better and keep in touch with them?

Survey your attendees prior to the event using a **form**, on Peatix, this is part of the ticket purchase process where attendees are prompted to fill out information in a form before they make payment for their tickets. This form is fully customizable. With well-crafted questions and analysis of the data, you can know your audience better in terms of demographic and behavior so as to inform on future targeting for event marketing, you can find out about specific food preferences, and even determine event topics by polling your audience. Keep the form short and simple! No one likes to fill out a lengthy form, particularly if their eye is on the prize, or in this case, ticket to your event.

Lack of information for marketing

Marketing your event, getting the word out to your target audience, is very important in driving ticket sales. Relying on word of mouth alone is rarely sufficient. Hypothesize where your audience would be looking for information on, be it Facebook, Twitter, LinkedIn, online or print media, YouTube, and so on, and market your event on the relevant channels. The money, though, is in the data. Find out which channels are bringing the most traffic or page views to your ticketing page, and review and tweak your budget to have more marketing spend for those channels. The organizer dashboard on Peatix has a pie chart that reflects where all the page views to your event page are being directed from. To better track your marketing campaigns and have its resulting page views reflected in the pie chart, tag your links using Google's **URL builder**.

Tool: Peatix event ticketing platform

Create sleek event pages, and manage events with ease in minutes. Book a **free 10 minute demo** with our event experts.

6 miscellaneous considerations for a successful event



Permits

Depending on your community regulations, you might be required to apply for a permit when hosting events. Some permits might take time to be processed and in order to ensure its approval, it's better to apply early.

F&B

Safety for the attendees should be a priority. When catering food for your event, check that the vendors have the required permits. If food is being cooked on the spot, ensure they have the necessary fridges and fire extinguishers on hand.

Music

Music sets the mood for your event. Curate playlists that will help you create the atmosphere. With streaming apps available, you can even skip the curating process as it has already been done for you.

Music Apps:



Contingency

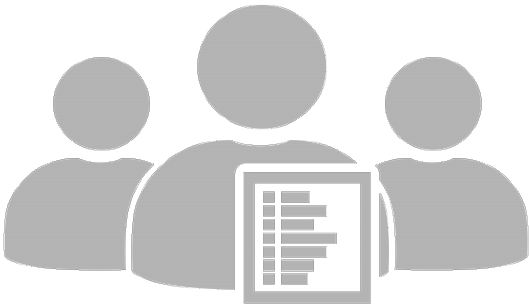
Hosting your event outdoors? Have a wet weather plan. A keynote speaker bails or a main performer falls ill? Plan how you would announce it or replace them. That said, in any event, live by the mantra that anything that can go wrong will go wrong. So even with backup plans, go with the flow, be adaptable and enjoy the process.

Scripts

Prepare a program outline for your emcee to structure their hosting script against. Provide your emcee with all the necessary information like performer or speaker name, designation, and background. Highlight to your emcee the vibe you want portrayed at your event.

Briefing

Before your event, have a complete rundown of the event with your volunteers and staff. Everyone should be familiar with what they've been tasked to do on event day.



Marketing

YOUR EVENT HAS GONE FROM IDEA TO REALITY. YOUR TICKETING PAGE HAS GONE LIVE. NOW ALL YOU NEED ARE PEOPLE TO JOIN IN THE EXPERIENCE.

HOW CAN YOU MARKET YOUR EVENT TO YOUR AUDIENCE EFFECTIVELY TO ATTRACT REGISTRATIONS AND TICKET SALES?

Run targeted ads on social media

Social media sites provides you with the avenue to reach people active on the social network. The responsibility lies with you to make your ads eye-catching and relevant to increase click through rates to your event page. One simple way is through being specific about who you want your ad to be shown to by indicating your target demographic, location, behavior and even right down to the kind of mobile device owned.

Amplify your event presence

Identify influencers whom have a significant following amongst the target audience you're trying to reach. Approach them to share your event on their social media channels, give them free passes, or a promocode for their followers.



Hold contests

What better way to grab your target audience's attention than to give them something they'll value? Think about what that might be – free tickets, limited edition merchandize, or exclusive meet and greet sessions with the speaker or performer.

5 ways to leverage social media to promote your event

Work with partners

Partners can include the media, vendors, speakers, performers, and even organizers of other events in the same genre! Propose a win-win situation where they can benefit from promoting your event through their channels.

Use hashtags

Coming up with an event hashtag is an art (think about these **7 questions** when coming up with one). The wonders of a hashtag is in its ability to collate all social media engagement with your event under one thread when you search for the hashtag on social media platforms. In this way, you can monitor your event's reach and effectiveness amongst your target audience.

3 steps to setting up ROI for your social media campaign



What is the ROI of a social media campaign?

It is the proof that your campaign is working (or not!) in generating ticket sales.

$$\text{ROI} = \frac{(\text{return} - \text{investment})}{\text{investment}}$$

Step 1: Choose a goal

What is your main goal with your social media campaign? Would it be to spread awareness of your event, to educate and entrench your event or brand as a thought leader, or grow your event's online following on a specific social media platform? Regardless the goal, the end point would be in directing more people to your ticketing page to purchase tickets.

Step 2: Track your goal

Breakdown your goal into measurable metrics you'll need to evaluate progress towards achieving your goal for the social media campaign. Depending on your goal and social media platform, you will need to track various metrics including:

- Level of interaction in terms of likes, comments, shares, retweets, clicks
- Increase in follower count
- Number of page views generated to your event page from the social media platform

Step 3: Measure ROI

Say your campaign has successfully reached your goals, how then can you measure its impact on eventual ticket sales or registration?

For the period of your campaign, identify the number of ticket sales you've made and calculate the cost per acquisition (CPA), in other words, how much money you've spent to get one additional ticket sale. For example, if you've spent \$10 on a campaign and had 10 ticket sales generated, that would mean a CPA of \$1. A good rule of thumb is that your CPA should not exceed 10% of your ticket price to generate a positive ROI on your social media campaign. If it does exceed 10%, it's time to re-evaluate the campaign's effectiveness in promoting your event.

7 tools for online marketing campaigns



Facebook

You can start running an ad once you have set up your ad manager account. The ads are easy to set up and you can choose from various ad campaigns that are optimised to your goals. Campaigns can start with as little as \$5.



Twitter

Similar to Facebook, Twitter allows you to run ads. For events promotion, you can choose to run "Website cards" or "Online tracking ads."



LinkedIn

If your event targets working adults, LinkedIn is a good platform to reach them. They are already in the frame of mind to find ways to improve themselves, so they are more likely to click on your ad.

AdWords

Google AdWords

With Google AdWords, you can advertise locally and attract customers with the products that they search for. You can implement pay-per-click ads.

AdRoll

AdRoll

This tool will allow you to recapture the attention of those who have been to your website or event page but have not bought tickets. The ad banner will follow them around on their journey through the web. This tool doesn't come cheap, but may be worth your while.



MailChimp

You can use this tool for sending out email campaigns. Keep track of the type of people whom have opened your email and clicked on your links, and use this information to customize other campaigns you run to target them. If you have less than 2000 people on your database, MailChimp is free to use.



Peatix

We know for sure that on Peatix, people spend more time browsing for events on mobile than on desktop. You can boost your event's visibility to our users on mobile through having a prominent feature in our free mobile app and mobile-friendly website.

[Learn more.](#)

Event Engagement

GIVEN THE AVERAGE ATTENTION SPAN OF PEOPLE IS EIGHT SECONDS, CAPTURING THE ATTENTION OF ATTENDEES AT AN EVENT CAN BE CHALLENGING.

3 ways to engage with attendees at the event



Live Q&A

Facilitate taking questions from the floor, even from those shy in speaking up using innovative ways like getting attendees to post questions to Twitter using a specific Q&A hashtag or use apps like Pigeonhole that enables attendees to post questions, vote on questions they want answered, and have the panel answer questions with the most votes.

Tools: Twitter or Pigeonhole



Use Energizers

If you're hosting an event with talks or a workshop, introduce breaks to re-energize and focus your audience! Keep talks short to 15-20 minutes. Get attendees to take a stretch or water break or even facilitate a quick networking break to chat with their neighbor giving them three questions they can ask like:

1. What project are you working on?
2. What brings you here today?
3. What's one guilty pleasure you have?

Networking

Networking apps for events allow attendees to see who will come for the event and request for meeting at the event. This is much more beneficial than serendipitous meetings. These apps come with event management solutions like showcasing floor layout, and agendas of event.

Tool: Jublia



Post-event Action

WHAT HAPPENS AFTER AN EVENT IS ALMOST AS IMPORTANT AS WHAT HAPPENS BEFORE IT.

After-Event Follow Up

Your event to-dos isn't quite over yet



Venue clean up

After attendees have left, inspect the space to check that everything is in place as when you first arrived. This will help in building a good working relationship with the venue, of which you may consider renting again for a future event. It's wise to build a network of event partners you can rely on.

Team debrief

A general debrief of everyone involved should take place post-event. Chat about what went well, what went wrong, and how things can be done next time around.

Collect attendee feedback

Understanding what attendees loved or disliked about your event is important in helping you stay relevant in organizing an event they will come for again and recommend to their friends.

Create surveys with these tools:



Typeform



Conclusion & Additional Resources

A SENSE OF ACCOMPLISHMENT, FULFILLMENT AND SATISFACTION – THAT DESCRIBES MANY AN ORGANIZER'S EMOTIONS AFTER AN EVENT ENDS.

Armed with the right tools, organizing events can be made more manageable by making the nitty-gritty simpler, and enable you to have more time for what's most important – to create the best experience for your community.

Below is the complete list of all 21 tools mentioned in this ebook for each stage in event planning.

Get Started: Ideation



Budget



Venue Selection



Venuerific

Planning & Operations



asana:

Engagement



Music



Social Media Marketing



Search Engine Marketing

AdWords AdRoll

Email Marketing



Survey



Ticketing & Community building



In this ebook, we've only touched the tip of the iceberg – find more event tips, tools, and ideas on our event management [blog](#).



Customizable
event pages



Zero platform
fees



Build a following
with groups



Attendee
Generation



Quick check-
ins



Event
Discovery



Ticketing and Community Management

Host a group and build a community avid about your event or a specific interest like cat photography, heritage walks, or digital marketing, and organize events for your group with all the tools you need to create events, promote and sell-out on Peatix.

Rally your community: Attract like-minded people to join your group to be first to know of new events you run. They're automatically notified. Save the need to start event promotion from scratch each time.

Be mobile-optimized: Make it convenient to purchase and access tickets on mobile.

Get discovered: Have more people find out about your events through our event recommendations and discovery features which has helped to sell 20% of all tickets sold on Peatix! Gain even more visibility to your target audience with Peatix boost.

Save on fees: Have more money for other event essentials like marketing and venue hire.

TRY PEATIX FOR FREE

LEARN MORE



Manage your next event on Peatix

Have less stress and more fun with the right tools.

Over 100,000 events have collected RSVPs and sold tickets using Peatix worldwide.
Join our community of organizers, experience first-hand the ease of managing events.

Yes, I want to
try Peatix!

Get a free
demo