Leverage this free event brief example template and customize it for your next virtual, in-person, or hybrid event.

You put your time and energy into planning an event, then someone on your team accidentally drops the ball on a deliverable or misses a key deadline –– sound familiar? Talk about frustrating and distracting.

Wouldn't it be nice if you could ensure all the moving pieces always fell into place without any surprises? Enter the event brief: every event professional’s best friend.  
  
An event brief serves as a map, of sorts, charting the course for you and your team from point A at the very beginning of your event planning journey to point B — every event professional’s ultimate destination — a successful, legendary event.   
  
Use this customizable template with examples to start crafting a brief for your

next event:

| Event Brief | |
| --- | --- |
| Overview and Key Event Information | |
| Today’s professionals know that creating a legendary event requires managing and tackling a myriad of activities, tasks, and action items. It’s a high-stakes effort. Even the tiniest mistake can derail your best-planned event. This section contains the most crucial information about your event so everyone can be on the same page — and your keynote speaker doesn't inadvertently book a flight the week after your event ends. | Common examples of key event info include:   * Event title: Your event title * Event date(s): Insert date(s) here * Event time(s): Insert time(s) here * Event run time: X Hours, days, week(s) * Event format: Virtual, hybrid, or in-person * Event location: Venue location (as applicable) * Event management platform: Main internal and technology point of contact and login instructions for team (as appropriate) * Event description: Add your event’s description here. * Check out some [examples](https://hopin.com/explore) for some extra inspiration. * Event website/registration link: Place your event website here. |
| Main Event Resources | |
| When it comes to events, teamwork makes the dream work. That’s why it’s so important for you and your team to stay on the same page throughout the event planning journey. The main resources section of the event brief can help you stay aligned.Be sure to provide your team with all the shared documents, files, and folders core to planning and executing your event (and don’t forget to set the proper viewing and editing permissions for each). That way, everyone involved can access, reference, and update documents from one centralized spot to stay on track — because at the end of the day, no one wants to miss the mark on key deliverables nor wind up feeling like they’ve failed their colleagues, because they weren’t in the loop. | Common examples of shared folders, files, and documents include:   * Event plan and project trackers * Budget spreadsheet * Run-of-show document * Communications plan * Design asset folder * Event landing page and registration reports |
| Purpose | |
| No one runs an event for no reason — because why would anyone put their blood, sweat, and tears into bringing amazing attendee experiences to life without one in mind? In this section, outline your overall purpose for running your event on paper by summarizing “the why” behind it and documenting the outcome(s) you want to achieve, as a result. Your purpose is unique to your event for a reason — so don’t make the mistake of investing in an event before first understanding and documenting your purpose for doing so. | Common purpose-driven outcomes and examples include:   * Driving brand awareness and/or establishing your company as a thought leader in your space * Attracting new prospective clients and/or deepening existing customer relationships * Fostering community for association or other types of membership-based organizations * Training and educating an internal or external attendee audience via an event experience * Sparking conversations around timely and vital cultural, professional, or industry trends or topics * Increasing employee engagement, reinforcing cultural values, and/or fostering collaboration |
| Goals | |
| How will your event move the needle for your company, client, or the like? These days, whenever we invest time, resources, and dollars towards any effort — it’s expected that we’ll get something specific back in return. Once you’ve tackled your purpose, use this section to determine the specific quantitative goals or targets you are setting out to achieve with your event, That way, you can avoid finding yourself in spot without any goals outlined to help guide your efforts, justify your investment, and showcase the value of the event you’ll work hard to create. | Common examples of event goals include:   * $X of pipeline or sales revenue * $X of profit or revenue from ticket sales and sponsorships * X% increase in customer satisfaction or NPS (Net Promoter Score) * X% increase in employee satisfaction or engagement levels * X% increase in social media followers, website visitors, or the like * X amount of registrants and/or attendees for your event |
| Budget | |
| Planning and hosting amazing events comes with a price tag, so get ahead of the game by creating an event budget — because there’s nothing worse than running out of cash or feeling to blame for overspending. In this section, include your event budget to keep you and your team on track with your detailed expenses (and revenue streams, if that’s part of the plan). Ensure folks on your team have easy access to update line items along the way — so you never have to worry whether you are staying on-track and on-budget at any point throughout the planning process. | Common details for an event budget include:   * Item name: Be as clear and accurate as possible. Link each name to its corresponding webpage for easy reference. * Description: Include a summary of only the most important details that all teammates and stakeholders will need to know. * Projected total: Conduct the necessary research to get an accurate estimate for each item. Remember to include taxes, shipping, and any related fees. * Actual total: Leave this column blank until you begin spending. Link to digital receipt files to streamline accounting later on. * Difference: Calculate the difference between the projected and actual cost of each item. This information will help you accurately estimate your next event budget. * Notes: Include collaborator questions, links to review pages, and anything else that is actionable for your event. |
| Audience | |
| The old adage of “Build it, and they will come” rarely applies in the world of events (or anywhere else for that matter). Why? Because attracting your audience to attend means tapping into their unique motivations, needs, and desires. In this section, spend the necessary time to get an in-depth understanding of your audience — because at the end of day, people only attend events that provide them value. And, there’s nothing worse than planning an event where only a few folks actually show up to attend it. | Utilize free online tools, like [Google Trends](https://trends.google.com/trends/?geo=US), [AnswerThePublic](https://answerthepublic.com/), and [Pew Research Center](https://www.pewresearch.org/topic/internet-technology/), to help you collect some vital information around your target audience, such as:   * Profession * Demographics * Online behavior * Key topics or trends |
| Theme | |
| Events are an experience — that’s what makes them such an effective way to bring people together and gives them the power to foster “magic moments” for attendees. So regardless of the format, put yourself in your attendees shoes and imagine yourself at your event. What will it look and feel like? What thematic elements really bring the experience to life in a meaningful and memorable way? Avoid anything that’s boring or distracting, because it’s attendee value that you're after. | Common thematic considerations to include:   * Theme description * Key topic areas * Branding:   + Tone of event (professional, casual, fun, serious, adventurous, etc.)   + Color palette (Will you use your own brand colors or pick out novel colors using some free inspiration, like [Colormind](http://colormind.io/) or [Adobe Color](https://color.adobe.com/explore)?)   + Event logo/visual design to be included throughout your event (from your event website and communications to your on-site venue and virtual attendee environment)   + Experiential elements: Mindfulness, yoga, hands-on workshops or classes, themed contests, event hashtags for social media sharing, etc. |
| Team Roles and Responsibilities | |
| Planning immersive, engaging event experiences is no small feat. Like they say, it takes a village to pull off. So, don’t get caught with a team of folks that are unclear of their role and responsibilities in your event — as that can become a key ingredient in a recipe for disaster. The good news? This is easy to avoid by using this section to align the team from the beginning of the process and establishing by each member’s key roles & responsibilities for your event, as well as key stakeholders to be involved in the planning, production, or promotional process. | Common staffing considerations include:   * On-site staff: event producer, emcees, hosts and co-hosts, reception/check-in, speaker liaison(s), lead event manager, A/V technicians, guest relations, sponsor coordinator, and more * Virtual staff: producers, [emcees and moderators](https://velvetchainsaw.com/virtual-emcee-moderator/), speaker liaison, technical support, and chat managers * Hybrid staff: A best practice for staffing hybrid events is to create separate but cohesive teams to support the virtual and in-person experiences. Additional hybrid event staff commonly include:   + virtual concierge, or [content weaver](https://velvetchainsaw.com/hybrid-conference-content-weaver/), for bridging the gap between virtual attendee participation, speaker Q&A, and more with the on-site team.   + A/V and live streaming technical staff |
| Speaker Sourcing and Management | |
| It’s pretty close to impossible to run an event without speakers to present and discuss its topics. So, this is a component you’ll want to get started on as soon as you can — and to avoid a last-minute, near-panic-attack-inducing scramble to find presenters as your live event inches closer. Use this section of the brief to outline and track your list of target and confirmed speakers as well as the logistics of their presentations and overall involvement in the show. | Common examples of speaker management and preparation status include:   * List of target speakers * Confirmed speakers * Presentations and speaker preparation:   + For speakers at in-person and hybrid events: Be sure to have a designated team member available to help speakers get to the right on-site location and assist with technical presentation set up.   + For speakers at virtual events: Be sure to plan and schedule practice sessions, or dry-runs, to ensure speakers are familiar with the format and comfortable presenting.     - Take it one step further by using [technical streaming preparation tools](https://hopin.com/pre-event-check/?utm_source=adhoc-cs) to make virtual presenting a seamless experience. |
| Agenda | |
| Your agenda serves as your teams’, your speakers’, and your attendees’ compass to navigate through each section of your event with ease and clarity — if your compass is broken, everyone ends up lost. And for events, this is something to be avoided at all costs. So, in this section, begin outlining your agenda for each day your event will take place. Be sure to include traditional run-of-show items, like start and end times, duration, sessions and keynotes with their corresponding speaker(s), networking time and/or activities, and of course, small breaks for your attendees. | Common agenda outlines follow the below format:   * Day 1:   + Start time   + End time * Sessions * Keynotes:   + Speaker(s) * Networking * Breaks:   + Don’t forget to play music to keep the energy flowing. * Activities:   + Duration, start and end times for each   Example: |
| Logistics and Experience | |
| Events are highly involved efforts with many steps, activities, and items to manage and track, even more so depending on their format and level of complexity. So, how can you wrangle all of these moving pieces without losing your sanity? In this section of your brief, start by detailing all of the logistics of your event and attendee experience. Once those are down on paper, be sure to add in status tracking for each item. That way, you can ensure nothing accidentally slips through the cracks and ensure that the attendee experience is one to remember. | Consider the following logistics common to most types of events:   * In-person logistics:   + Check-in/reception, badge printing, food and beverage catering, swag, contests/giveaways, exhibitors/sponsors, event hall, printed materials and signage, equipment and furniture rentals, internet and electricity, VIP areas (if applicable), music, and the like * Virtual logistics:   + Catering or meal voucher delivery (if desired), mailed swag, contests/giveaways, exhibitors/sponsors, VIP experiences (if applicable), digital content downloads, speaker gifts, music, and the like * Hybrid logistics:   + See above. Virtual/In-person connection points, like breakout rooms and equipment (if/as appropriate) |
| A/V (Audio/Visual) | |
| Are you planning on live streaming, recording videos, or capturing photography at your event? If so, this is how to make sure the expense is worth its weight and that your event runs smoothly and seamlessly — and to steer clear of growing more pesky gray hairs that seem to emerge when a live event goes awry. Use this section to outline what needs to occur for A/V success, what physical or virtual settings you want captured, and to keep track of any live streamed or recorded sessions. If you don’t have an in-house A/V expert, be sure to stay closely aligned and in sync with your A/V partner (if/as applicable). | Common examples of A/V considerations include:   * Audio/Visual needs * A/V partner * Deliverables * Equipment rentals * Focus areas to capture * RTMP/Live streaming (if desired) |

Use this template for all your events to achieve

snag-free success

You put your blood, sweat, and tears into planning each and every one of your legendary events, right? So, avoid the headache, frustration, and chaos of missing the mark on key deliverables, mixing up crucial dates, and running into other pitfalls along the way by using this event brief template for every event you plan.   
  
This template will help you craft briefs that ensure you and your team are:

* Always aligned and planning in lock step with one another
* Equipped to run events your attendees will rave about
* Recognized for the results you’ve worked so hard to achieve
* Confident that you have a model for repeatable success

Interested in more expert advice to make your events even more successful? Let's talk about the untapped potential Hopin can unlock for you. [Contact us](https://hopin.com/contact-sales) today to learn more!  
  
