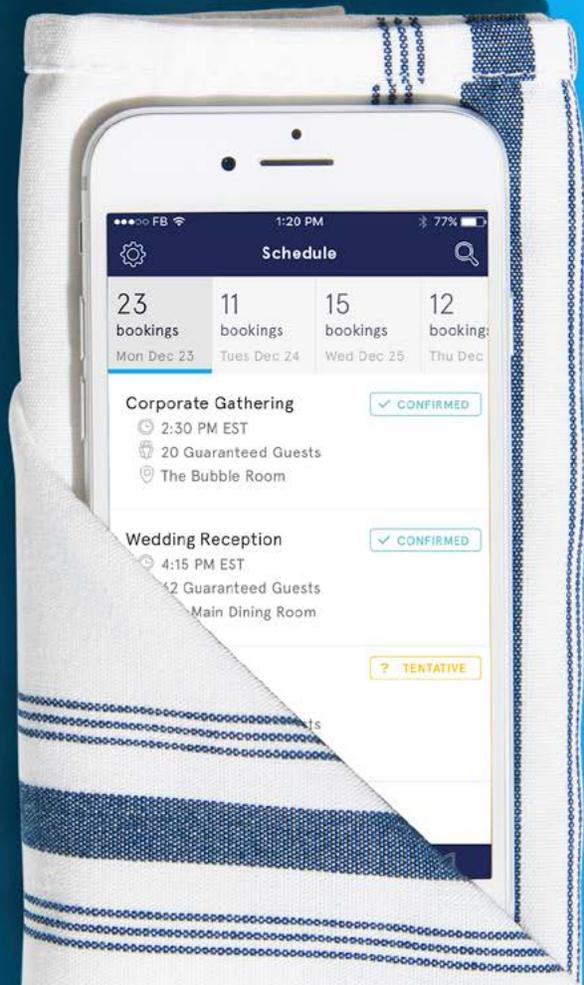
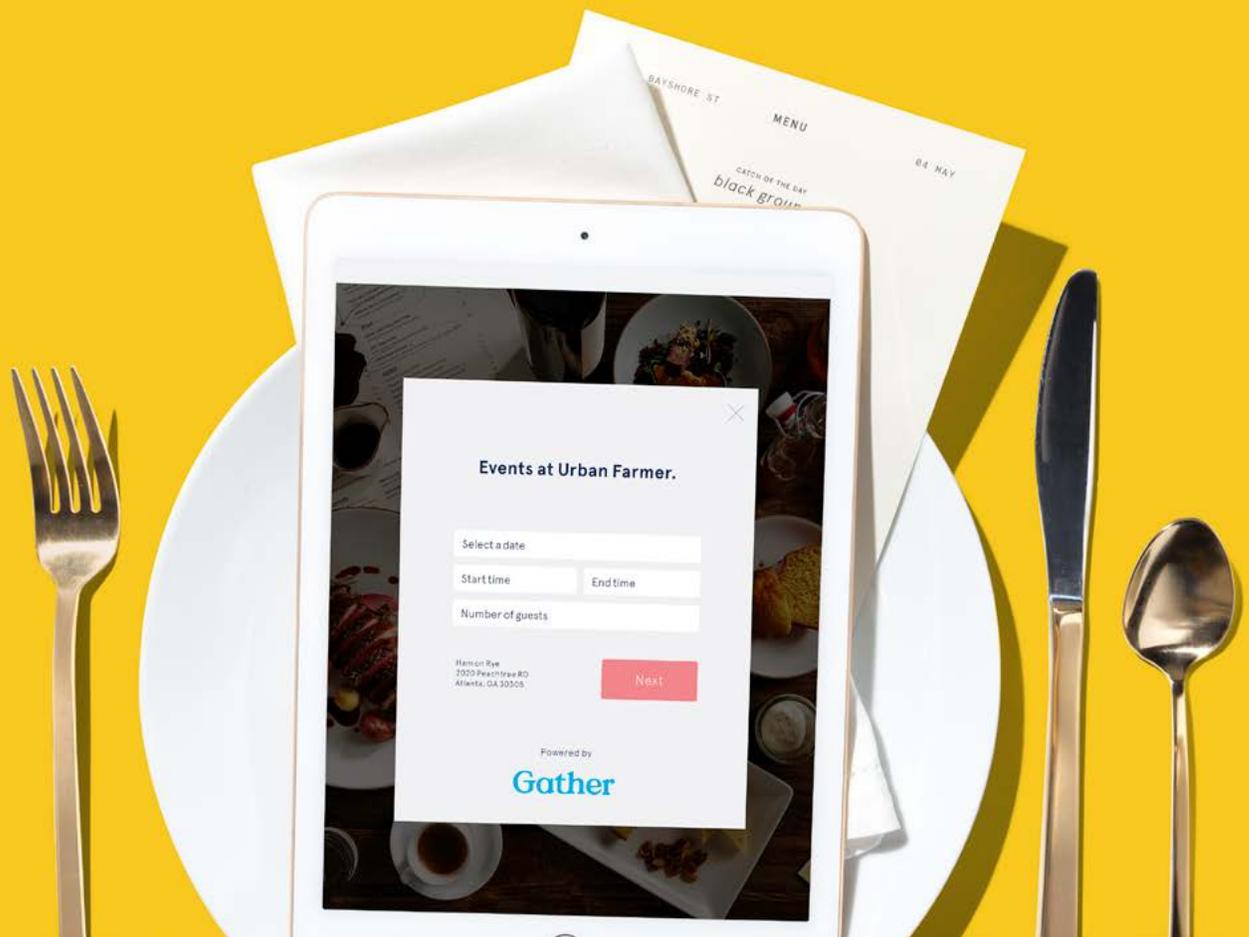


# Gather

## The Ultimate Gather Event To-Do List

A Step-By-Step Checklist for Using Our Software to Manage Your Event

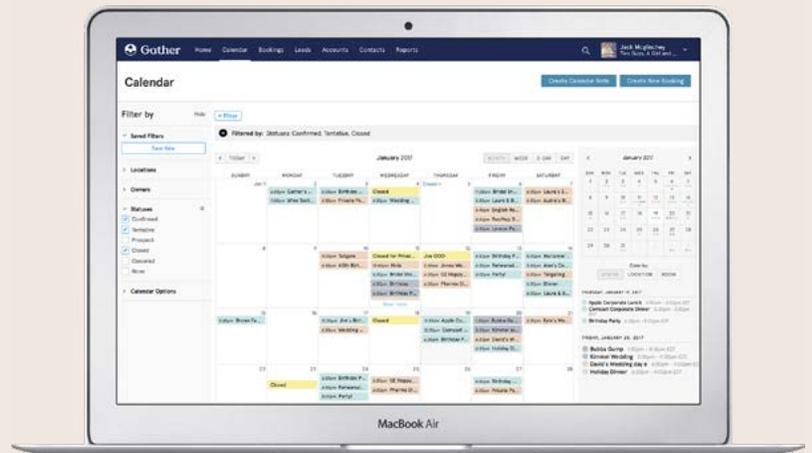




## Set Yourself Up for Success

We know it seems like there are a million details to keep track of when it comes to managing private events. But before you get stressed, remember that using Gather provides you with the tools you need to build the best possible events business. And the more attention to detail you have, the more impressed each of your clients will be. So, how can you make sure you and your team are following all of the necessary steps to put on a successful event, time after time, while getting the most out of your Gather software?

We've crafted an event planning template you can customize for your specific venue that takes you from initial inquiry to post-event feedback request.



# The Checklist

Automatically receive lead through Gather lead widget on your site

Send a templated email via Gather linking to menus

Send customer portal link to collect signature on proposal (event policies and credit card form are also included)

Credit card info complete and event policies approved

Confirm the event in Gather

Note that approved event policies and credit card info have been received in Team Communication, along with any other important internal notes

Send confirmation email to client noting the event is confirmed

Send template list of questions for menu and event details planning (if you haven't collected menu details prior to sending proposal)

Confirm menu and enter details into Gather, noting any special instructions for: table setups, menu serving, decor, payment, transportation/valet parking, A/V, and beverage

Send a message in Gather with the BEO template and request email approval of the details

Post BEO approximately 10 days in advance of the event date

Confirm guaranteed guest count 48 hours in advance and enter it in Gather. Update estimated guest count if need be

Create and print event menus, automatically available in the Documents tab of the booking

Event! 🎉

Attach receipt in Gather under bookings/documents

Add payment in Gather and close booking

Send thank you note via Gather and include the receipt along with guest feedback request

# Gather

Learn more at [gatherhere.com](https://gatherhere.com)