📄 EVENT BRIEF TEMPLATE

Event Name:  
Event Date(s):  
Event Time:  
Event Location / Venue:  
Event Type: (e.g. leadership offsite, employee celebration, strategy rollout)  
Event Owner(s): (e.g. LOB leader, Bank President)  
Comms Partner:  
Event Planner:

‣ 1. Event Purpose  
Briefly describe the strategic intent of the event. What do we hope to accomplish?

‣ 2. Key Objectives  
List 2–3 primary goals for this experience. For example:  
- Reinforce company strategy and priorities  
- Increase employee connection and engagement  
- Recognize high performers  
- Gather feedback from leadership or employees

‣ 3. Primary Audience  
Who will attend? Include estimates if the list isn’t final.  
- Audience Type: (e.g. senior leaders, all staff, hybrid attendees)  
- Estimated Headcount:  
- Special Considerations: (e.g. dietary, accessibility, language)

‣ 4. Key Messages & Themes  
What are the core messages we want to communicate?  
What themes should be reflected in tone, visuals, or activities?

‣ 5. Event Format & Agenda Framework  
Describe the general structure (1-day, multi-day, onsite/offsite, breakout sessions, meals).  
- Preliminary Agenda Flow:  
- Will this include breakouts?  
- Will there be team-building or networking time?

‣ 6. Tone & Experience Style  
How should the event feel to attendees? Choose from examples or write your own.  
- Professional, inspirational, celebratory, interactive, relaxed, formal, high-energy  
- Should there be music, videos, audience engagement elements, surprises, giveaways?

‣ 7. Creative Needs  
What creative support will be needed? (e.g. signage, presentations, branding, staging)  
- Requested design elements:  
- Are we working with external vendors or internal design teams?  
- Deadline for final creative:

‣ 8. Venue & Logistics Needs  
What are the functional requirements?  
- Number of meeting days:  
- Number of overnight guests:  
- Meeting space needed: (main session, breakouts, reception?)  
- Food & Beverage needs: (breakfast, lunch, reception?)  
- AV/Tech: (projectors, microphones, music, live stream?)

‣ 9. Success Metrics  
How will we know this event succeeded?  
- Survey questions to measure experience?  
- Desired engagement level or behavioral outcome?

‣ 10. Next Steps  
Who owns what and what’s due next?