

Event Platform Selection Checklist

Designed by eventira.com

This checklist is designed to help you evaluate and select the best event platform for your needs. Use it as a guide to ensure your chosen platform meets all key requirements, from user experience to budget.

1. Prioritize a Seamless User Experience

Goal: *The platform should be intuitive for all attendees, regardless of their tech skills.*

- ☐ Test registration and streaming on both **mobile and desktop devices**.
- ☐ Ensure a **Progressive Web App (PWA)** or responsive browser version is included in the base plan.
- ☐ Verify that **navigation is intuitive** with clear menus.
- ☐ Check for **free guided tutorials or tooltips**.
- ☐ Confirm the ability to **tailor content** and create personalized journeys for in-person and online attendees.
- ☐ Ensure options to engage attendees via **push notifications**.

Budget Tip: Look for **pay-per-use streaming** or **free tiers** for smaller audiences.

2. Ensure High-Quality Streaming

Goal: *Avoid technical issues that could disrupt your event.*

- ☐ Confirm **HD video (\$1080p\$ or higher)** is in the base plan.
- ☐ Test streaming on **low-bandwidth connections** (e.g., \$3G/4G\$).
- ☐ Ask about the **load capacity** for your specific audience size.
- ☐ Request **uptime statistics** (aim for **99.9%+**).

Budget Tip: Use platforms that work with **free or low-cost tools like barcode scanners** instead of proprietary hardware.

3. Integrate with In-Person Tech

Goal: *The platform must sync smoothly with on-site tools.*

- ☐ List all your **on-site technology** (e.g., badge scanners, projectors).
- ☐ Verify compatibility with **affordable AV equipment**.
- ☐ Test **real-time syncing of attendee data**.
- ☐ Confirm **free API support** for integrations.

Budget Tip: Use platforms that work with **free tools like Google Sheets or PayPal**.

4. Integrate with Existing Tools

Goal: *The platform should fit seamlessly into your existing workflow.*

- ☐ List all your **current tools** (CRM, email marketing, payment systems).
- ☐ Verify **free API support** for integrations.
- ☐ Test **data syncing with free tools**.
- ☐ Confirm **compatibility with low-cost badge printers**.

Budget Tip: Prioritize **free tools like chat or basic polls** over **premium features like gamification**.

5. Enhance Attendee Interaction and Community

Goal: *Create a memorable and engaging experience.*

- ☐ Enable **free polls, Q&A, and chat** for sessions.
- ☐ Set up **virtual lobbies or discussion boards** for mingling.
- ☐ Use basic **AI matchmaking or attendee profiles** if included in the plan.
- ☐ Promote **pre-event networking** using free tools.

Budget Tip: Choose platforms with **basic analytics** in the base plan.

6. Demand Robust Analytics

Goal: *Measure your event's success with data.*

- ☐ Confirm **free, real-time analytics** for attendance.
- ☐ Check for **exportable reports** in CSV/PDF format.
- ☐ Test the **dashboard's usability** during the setup process.
- ☐ Ensure metrics cover both **in-person and online audiences**.

Budget Tip: Opt for platforms with **built-in security** to avoid compliance costs.

7. Prioritize Security and Privacy

Goal: *Protect attendee data and build trust.*

- ☐ Verify **GDPR/CCPA compliance** for your region.
- ☐ Confirm **basic encryption** for live streams.
- ☐ Check that **secure payment gateways** are included in the base plan.
- ☐ Review the platform's **data storage and privacy policies**.

Budget Tip: Choose platforms with **free accessibility features**.

8. Ensure Accessibility for All

Goal: *Make your event inclusive for everyone.*

- ☐ Test **free closed captioning** for live sessions.
- ☐ Verify **compatibility with screen readers**.
- ☐ Enable **multilingual options** if they are included.
- ☐ Ensure **mobile check-in is accessible**.

Budget Tip: Use platforms with **free branding options**.

9. Customize for Brand Consistency

Goal: *Reinforce your brand identity.*

- ☐ Upload your **logo and brand colors** to the platform.
- ☐ Customize **registration pages** using free templates.
- ☐ Create **tailored content** for different audiences.
- ☐ Test how **branded visuals** appear within the platform's interface.

Budget Tip: Choose platforms with **affordable tiered pricing**.

10. Plan for Scalability

Goal: *Ensure the platform can grow with your events.*

- ☐ Confirm capacity for **future audience growth**.
- ☐ Review the **affordable pricing tiers**.
- ☐ Test **performance with a simulated audience size**.
- ☐ Ask for **case studies of similar events**.

Budget Tip: Opt for platforms with **free recording features**.

11. Offer On-Demand Content

Goal: *Cater to different time zones and schedules.*

- ☐ Test the **recording and upload process**.
- ☐ Set up **on-demand access** for attendees after the event.
- ☐ Verify **playback on multiple devices**.

Budget Tip: Avoid platforms that require **paid support upgrades**.

12. Demand Reliable Support

Goal: *Get help quickly when you need it.*

- ☐ Test the **support team's response time** via chat or email.
- ☐ Confirm **\$24/7\$ availability** in the base plan.
- ☐ Request a **free account manager** if possible.
- ☐ Save **support contact details** in an easy-to-access location.

Budget Tip: Choose platforms with **free dashboards** to avoid training costs.

13. Simplify Setup and Management

Goal: *Save time and effort on platform administration.*

- ☐ Test the dashboard for ease of use and look for **AI-assisted content generation**.
- ☐ Set up a **sample event** to see how it works.
- ☐ Ensure **non-technical staff** can navigate the platform.
- ☐ Verify **bulk upload options** for attendee data and schedules.

Budget Tip: Use platforms with **free time zone adjustments** to save on custom coding.

14. Support Time Zone Flexibility

Goal: *Accommodate a global audience.*

- ☐ Enable **time zone adjustments** for all schedules.
- ☐ Test how the **agenda displays in multiple time zones**.
- ☐ Confirm that **email reminders adjust automatically**.
- ☐ Provide a **free time zone converter tool**.

Budget Tip: Look for **free multi-event management** for small-scale events.

15. Manage Multiple Events

Goal: *Efficiently handle a portfolio of events.*

- ☐ Set up **two sample events** with unique branding.
- ☐ Verify **independent settings** for each event.
- ☐ Test **cross-event analytics**.
- ☐ Confirm **bulk management features**.

Budget Tip: Focus on **robust free tiers** or **low-cost plans**.

16. Evaluate Pricing and Value

Goal: *Make a smart financial decision based on total feature value.*

- ☐ Request a **detailed pricing breakdown** (including overage/per-attendee costs).
- ☐ Compare **features across at least three platforms** to ensure you're getting competitive value.
- ☐ Schedule a **live demo** to assess the platform's true value and ask pointed questions about ROI.

Budget Tip: Choose platforms with **proven reliability** in **free or low-cost tiers**.

17. Confirm Contract and Hidden Fees

Goal: *Protect your budget from unexpected costs and long-term lock-in.*

- ☐ **Check for any hidden fees** (e.g., exit, cancellation, or long-term data storage fees).
- ☐ Clarify the **data ownership clause** and ensure you can easily export all attendee data if you switch vendors.
- ☐ Verify the **renewal process and price lock** for the following year.
- ☐ Review the **Service Level Agreement (SLA)** for guaranteed uptime and support response times.

Budget Tip: Always negotiate to include a **free trial or pilot event** in the contract.