Event closeout guide

Closeout starts while the event is still fresh. Assign an owner and use the same process across shows so costs, operational details and results can be compared.

1. Collect the final records

[ ] Gather invoices, receipts, booking changes and final vendor charges.

[ ] Record any expenses or credits that were not captured during planning.

[ ] Confirm that event documents and notes are stored with the right records.

[ ] Identify outstanding items and give each one an owner and follow-up date.

2. Reconcile the financials

[ ] Compare recorded expenses with final invoices and resolve duplicates or missing costs.

[ ] Confirm payments, balances due and credits still expected.

[ ] Compare actual event cost with the budget target and document meaningful differences.

[ ] Apply cost centers consistently if your organization tracks them.

3. Finish assets and inventory

[ ] Record returned equipment, returned collateral and giveaway usage.

[ ] Confirm return shipment details and update storage information when needed.

[ ] Note damage, missing items or repairs needed before the next show.

[ ] Review low stock and assign replenishment work.

Event closeout guide - continued

4. Record outcomes

[ ] Enter the metrics and opportunities your team collected, using a consistent definition.

[ ] Review each objective and record what the event achieved.

[ ] Distinguish observed results from estimates and outcomes still awaiting follow-up.

[ ] Review financial returns when the underlying revenue and cost data are available.

5. Capture team learning

[ ] Ask what worked in the booth, schedule, travel and logistics.

[ ] Record issues that affected customers or staff and how the team handled them.

[ ] Identify repeatable improvements, with an owner for each next action.

[ ] Keep lessons with the event so the next planning team can find them.

6. Decide what comes next

[ ] Compare results and objectives with other shows before deciding to return.

[ ] Record the participation recommendation and any conditions for next year.

[ ] Update task templates, budgets or asset plans using the lessons learned.

[ ] Leave open follow-up work visible; an event ending does not mean every task is finished.

An initial closeout can happen before every sales outcome is known. Record what is confirmed now and assign follow-up for results that take longer.

Adapt this resource to your event organizer requirements and organization policies.