

AI event planning checklist

Download this template to easily get started with AI in your event planning.

This checklist walks you through every phase of fundraising event planning, with the right AI tool and a ready-to-use prompt for each task. Work through it phase by phase, adapt the prompts to your organization, and always review AI outputs before acting on them.

Phase 1: Research and strategy

Task	Tool to use	Prompt to use
Analyze past event attendance and donation patterns	ChatGPT, Gemini, or Perplexity	"Here is data from my last three fundraising events. Identify patterns in attendance, donation totals, and donor behavior."
Find what similar nonprofits are doing	Perplexity	"What fundraising event formats are small [cause type] nonprofits using successfully in 2025?"
Generate event ideas based on your goal and budget	ChatGPT or Gemini	"I run a small nonprofit and want to host a gala for around 200 donors with a budget of \$[X]. What themes or formats would work best?"
Filter event ideas by fundraising objective	ChatGPT or Gemini	"We want to raise \$20,000 and strengthen relationships with existing mid-level donors. Which of these five event formats would work best and why?"

Phase 2: Audience targeting and donor segmentation

Task	Tool to use	Prompt to use
Segment donor list by giving frequency, gift size, and engagement	Your CRM or ChatGPT (with anonymized data)	"Here is my donor list segmented by giving frequency and average gift size. Group them into three audience tiers for a fundraising gala."
Identify high-intent attendees from past events	ChatGPT or your CRM analytics	"Based on these donor signals (past check-ins, email opens, volunteer activity), flag who is most likely to attend our upcoming event."

Run wealth screening on attendee list	Wealth screening tools (e.g. DonorSearch, iWave)	<i>Upload attendee list and review flagged profiles before the event</i>
Assign staff to initiate conversations with major gift prospects	Internal planning (no AI tool needed)	<i>Review flagged profiles and assign relationship owners before event day</i>

Phase 3: Event logistics and operational planning

Task	Tool to use	Prompt to use
Build a budget forecast using historical event financials	ChatGPT or analytics platform (with anonymized data)	<i>"Here are revenue and expense figures from my last two events. Identify cost patterns and suggest a realistic budget for a similar event this year."</i>
Generate a backwards planning timeline	ChatGPT or Gemini	<i>"Build a 10-week planning timeline for a 150-person fundraising gala with a team of three staff members."</i>
Create a vendor sourcing checklist	ChatGPT or Gemini	<i>"Give me a checklist of questions to ask a venue before signing a contract for a 150-person fundraising event."</i>
Build a day-of volunteer briefing checklist	ChatGPT or Gemini	<i>"Create a day-of volunteer briefing checklist for a 200-person charity auction."</i>
Draft a day-before vendor confirmation	ChatGPT or Gemini	<i>"Draft a day-before confirmation email to send to all vendors for a fundraising gala."</i>

Phase 4: Event promotion and outreach

Task	Tool to use	Prompt to use
Draft event invitation emails and donation appeals	ChatGPT or Gemini	<i>"Write a 100-word email inviting previous donors to our annual gala. Warm and personal tone. Include event date, cause, and a clear call to action."</i>
Set up automated email workflow in your CRM or email platform	HubSpot, Mailchimp, or your CRM	<i>Map out: save-the-date, registration confirmation, countdown reminders, event-day details, and final giving prompt</i>

Optimize send timing and subject lines	HubSpot or Mailchimp AI features	<i>Use platform-native AI to test subject lines and identify best send times based on past donor engagement</i>
Set up AI chatbot for attendee support	Intercom, Drift, or similar chatbot tool	<i>Configure to cover: bidding instructions, payment questions, event schedule, and cause information</i>

Phase 5: Post-event follow-up and analysis

Task	Tool to use	Prompt to use
Send automated personalized thank-you messages	Your fundraising platform (e.g. RallyUp)	<i>Configure to pull individual donor data: gift amount, auction item won, cause funded</i>
Generate full event performance report	ChatGPT or Gemini (with anonymized post-event data)	<i>"Here is my post-event data. Compile a summary covering total funds raised, attendance vs. prediction, top auction items, and cost per dollar raised."</i>
Identify donors to prioritize for personal follow-up	ChatGPT or Gemini (with anonymized data)	<i>"Review this event data and flag donors who gave above their usual amount, were highly active in auctions, or donated for the first time."</i>

Tip: Always anonymize or remove personally identifiable donor information before uploading any data into a general-purpose AI tool. Use enterprise plans where possible for stronger data protection.