

Meeting Planner's Planning Timeline

This timeline provides a checklist for your event. Adapt it to your own particular needs – establish your own 'ideal' and 'can't-miss' due dates.

From 3 months out, or at time of booking

- Determine the objective of the meeting and develop the program and budget.
- Book meeting site and support services (Check calendar of local events to avoid conflicting or inappropriate dates.)
- Send letters of agreement to hotel and suppliers.
- Set up master account for your meeting charges with the hotel. (authorize who can sign charges)
- Invite speakers and inform them about your attendees and the facilities of the hotel, including audiovisual capabilities.
- Notify attendees.
- Make travel arrangements.

At least 5 weeks before your event

- Confirm menus, room setups and supplies in writing with your event manager/coordinator – review and BEOs
- Monitor speakers' presentation development and offer assistance in reproducing any handouts.
- Order signs and printed materials.
- Mail attendees the agendas, suggested dress and other instructions.
- Order gifts and amenities. Arrange deliveries of gifts (and meeting registration materials) with your hotel contact.

- Submit rooming list to hotel and confirm arrangements for amenities.

At least 3 weeks before your event

- Check with your speakers regarding the progress of their presentations, audiovisual and logistical arrangements.
- Schedule pre-convention meeting

At least 1 week before your meeting

- Ship materials to arrive 24 hours before your arrival and confirm arrival before leaving your office.
- Confirm all audiovisual requirements and produce slides.
- Make arrangements for shipping materials back to your office after the meeting.
- Confirm (XX days in advance, per facility agreement) your meal and beverage counts for the first day food functions.
- Take a complete master set of all handouts with you. (If your shipment of materials is lost or delayed, you can arrange to have your master set photocopied)

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Upon Arrival

- Review details and walk through your meeting space with your property banquet manager.
- Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition

Day of event (s)

- Check function space one hour in advance.
- Notify your event manager/coordinator immediately of any changes in your plans or requirements.
- Sign banquet checks each day and keep an ongoing record of your on-site expenses.

Concluding a successful event

- Meet with your event manager/coordinator to review your sessions, charges and receipts.
- Share with your event manager/coordinator the names of personnel who have provided extraordinary service.
- Schedule a post-convention meeting to discuss what can be improved upon for next event.