

MEETING/EVENT CHECKLIST

ORGANIZE MEETING NOTES AND MATERIALS AND REVIEW YOUR TIMELINES

Once you've established the framework of your meeting and have outlined its general requirements, you are ready to discuss planning specifics. You may find it helpful to set up an organizer with sections for the various planning steps, so you can keep all the meeting information in one place.

Some suggested section titles include:

- Schedules
- Audiovisual equipment
- Budget
- Food and Beverage
- Contacts
- Speakers
- Entertainment
- Event communications
- Meeting room setups



3 TO 5 MONTHS OUT

- Determine the objective of your meeting
- Get your budget approved
- Check calendar of events taking place near your desired venue to avoid conflicts
- Book meeting site and hotel rooms if needed
- Speak to the Manager of Meetings and Special Events about menus and meeting room needs
- Set up master account for meeting charges and determine who can sign for charges
- Invite speakers and provide scope of desired presentation
- Invite attendees
- Decide on any marketing needs; begin creative development

TIMELINE

These are general guidelines to keep in mind concerning what needs to be done and when. You may be on a tighter deadline, or have luxurious amounts of time (lucky!). Generally, you should start planning three months in advance so your attendees can arrange their schedule, speakers can begin to prepare their presentations, and you can relax a bit. Every program is different, so adapt this timeline as needed.



- Order signs and printed materials
- Introduce any marketing materials into market
- Mail agenda and any brochures to attendees; suggest a dress code and arrival times

WRAP UP

Sit down with the Manager of Meetings and Special Events to review all your sessions and your charges. Be sure to praise the performance of staff who have provided exceptional service. Consider circulating a survey or a feedback form to attendees to assess success of event and areas of improvement for next time. Pat yourself on the back: nice job!

3 WEEKS BEFORE MEETING

- Check in again with speakers; offer assistance with A/V and handouts
- Reconfirm quantity of hotel rooms needed-reconfirm amenities

1 WEEK BEFORE MEETING

- Ship materials to location so that they arrive AT LEAST 24 hours before your arrival
- Confirm all outside equipment orders (like A/V)
- Make arrangements for shipping materials back to your office after event
- Finalize food and beverage counts for the first day of events
- Finalize needs for outside tickets/entertainment sources
- Take a master copy of all handouts and brochures; in a pinch, you can arrange to have them copied
- Take a deep breath; you're almost there

DAY BEFORE MEETING

- Review details with the Manager of Meetings and Special Events
- Inspect all shipped materials
- Inspect signage
- Ensure rooms have proper amenities Relax; everything will be great!

MEETING DAY(S)

- Check all function spaces one hour before use
- Notify Meetings Director immediately of any changes
- Meet with Meetings Director every afternoon/evening to go over itemized costs for the day
- Be available for attendees; be patient if they offer advice or criticism (it's been known to happen); thank them warmly for compliments

AT LEAST ONE MONTH BEFORE EVENT

- Confirm menus, room setups and supplies in writing with your Meetings Director
- Reach out to speakers to check on their presentations (they'll likely need urging)