

# MEETING PLANNER GUIDE

## TIMELINE & CHECKLIST

### SIX MONTHS OUT

- [ ] Establish meeting objective(s), subjects to be covered and theme.
- [ ] Determine who is to attend, including local guests and other VIPs.
- [ ] Create checklist for all meeting segments and assign responsibility and completion dates.
- [ ] Select several possible meeting dates and sites, keeping in mind local holidays, events and weather conditions.
- [ ] Contact convention and visitor bureaus, national tourist offices, hotel/conference centers, and representative sales offices (on-site, regional, or national) and visit websites to research site selection.
- [ ] For international meetings, take into account cultural considerations, including holidays and other events. Also, contact your local U.S. embassy or consulate and make arrangements for banking needs, select a receiving agent for shipments needing customs clearance, and determine and contract for other third-party vendors.
- [ ] Check references from other meeting planners of recent and comparable meetings and select facility/destination.

### FOUR TO SIX MONTHS OUT

- [ ] Inform potential attendees of date and place of meeting.
- [ ] Issue media release, if desired.
- [ ] Meet with the onsite team at site selected. Walk the space to discuss the meeting flow.
- [ ] Refine program and agenda.
- [ ] Select speaker topics and speakers, and determine speaker audiovisual requirements.
- [ ] Negotiate and sign facilities contracts, including food and beverage agreements, meeting room use, other necessary clauses (attrition, indemnification, arbitration, etc.) and display or use of competitive goods and services, if appropriate.
- [ ] Contract with airlines, ground transportation and a destination management company, as necessary.
- [ ] Order and confirm delivery date of giveaways.
- [ ] Determine arrangements for shipping materials.
- [ ] Select photographer, entertainment and security vendor.
- [ ] Determine and arrange for on-site office and communications. needs, including Internet provider.

### THREE MONTHS OUT

- [ ] Obtain rights and permission for any material you intend to reproduce.
- [ ] Plan and arrange airport arrival needs for meet-and-greet, particularly if security clearance and passes are needed.

# MEETING PLANNER GUIDE

## TIMELINE & CHECKLIST

*continued from previous page*

### **TWO MONTHS OUT**

- [ ] Addendums and/or reductions to sleeping rooms.
- [ ] Determine meeting room setups.
- [ ] Order necessary signage.

### **FOUR TO SIX WEEKS OUT**

- [ ] Reproduce materials for distribution.
- [ ] Reconfirm arrangements with all suppliers.
- [ ] Send attendees information about the meeting, participation requirements and hotel/conference center facilities.

### **TWO WEEKS OUT**

- [ ] Initial Rooming List needs to be sent out along with any dietary needs.
- [ ] Ship materials in numbered containers (via air express) to meeting site and confirm acceptance and location of materials
- [ ] Prepare name badges for all attendees.

### **THREE DAYS OUT**

- [ ] Conduct briefing meeting for your own staff about on-site administration and responsibilities.
- [ ] Check inventory of materials and supplies shipped in advance, including handouts.
- [ ] Hold a pre-conference meeting: Review last-minute changes to conference résumé, including guarantees, and remind facility staff of importance of meeting.
- [ ] Meet with facility accounting department to confirm procedures for daily review of charges to master account and prepare final accounting and auditing report of all charges.
- [ ] Confirm information to be posted on reader boards.
- [ ] Provide hotel with the final list of names, highlighting VIPs.
- [ ] Meet with facility security, and review procedures (also meet with local security, if necessary).
- [ ] Review rooming list with front desk and confirm all pre-registered attendees and procedure for check-in; inspect rooms assigned to VIPs and to attendees requiring rooms that meet ADA standards.
- [ ] Check weather reports for arrival delays and review alternate plans; coordinate airport meet-and-greet plans.
- [ ] Coordinate specific times for guest room delivery of any meeting materials and/or gifts for VIPs.
- [ ] Set up private office space and separate registration area.

### **POST-MEETING**

- [ ] Run separate post-meeting follow-ups with your own staff and the facility and issue specific gratuities where deserved.
- [ ] Send thank-you letter to facility.