

# Meeting Planner Checklist

## Define Meeting/Event

- Goal and objectives
- Meeting theme, if any
- Number of potential attendees

## Establish Budgets

- Master account
- Deposit accounts
- Set registration fees
- Expenses:
  - Printing
  - Speaker fees
  - Mailing and postage
  - Entertainment
  - Exhibit space
  - Meals
  - Signs and decorations
  - Extra help
  - Beverages and snacks
  - Transportation
  - Other expenses
  - Total expenses
  - Registration fees
  - Exhibit space rental
  - Total income
  - Sponsorship

## Set Timeframe

- Length of meeting
- Date of meeting

## Establish Meeting Content

- Entertainment
- Tentative agenda
- Audiovisual requirements
- Signage and decorations

## Attendance Promotion

- Attendance goals
- Prepare meeting program and scheduling
- Pre-meeting press releases
- Pre-meeting advertisements
- Exhibitor solicitation materials
- Meeting announcements
- Initial and follow-up mailings

## Select Hotel/Venue

- Establish hotel/venue contact person
- Tax-exempt certificates if applicable
- Meeting rooms
  - Sq. ft. needed
  - Type of room
  - Setups to be used
  - Audiovisual needs
  - Cost
  - Lighting
  - Ventilation

Desired amenities

Access

## Exhibit space

- Sleeping rooms
- Rates
- Number available \_\_\_\_\_
- Business services available (fax, voicemail, etc.)
- Construction/renovations planned during meeting
- Other events at the venue during meeting

## Arrange Housing

- Room block commitments
- Reservation policy
- Date of reservation cutoff
- Cancellation policy
- Deposit policy
- Confirm check-in/check-out times
- Design reservation form
- Send information to conference participants !
- Complimentary rooms
- VIP accommodations
- Hospitality suites
- Signature authorization

## Publicity

- Local media
- News releases for trade media

## Food and Beverage

- Other meals to be served
- Attendance at each meal
- Select menus
  - Specify any dietary restrictions necessary
- Obtain menu costs
- Establish ticket system for meals and beverages

## Leisure Activities

- Tours and sightseeing
- Shopping
- Nightlife

## Transportation

- Schedules for airlines, busses, etc.
- Airport to hotel transportation
- VIP transportation
- Transportation to functions and leisure activities

## Security

- Medical emergency plan
- Names and phone numbers for local police, fire departments and hospitals

## Registration

- Policies and procedures
- Necessary forms
- Registration areas
- Equipment, supplies and signage for registration area

