

PLANNING TIMELINE--MEETING

This timeline provides a checklist for your event. Adapt it to your own particular needs—establish your own “can’t-miss” deadlines.

FROM 3 MONTHS OUT, OR AT TIME OF BOOKING

- Determine the goals of the event and develop the budget
- Book the event site and vendor services.
- Send letters of agreement to event site and suppliers.
- Set up master account for your meeting charges with the site (authorize who can sign for charges).
- Invite speakers and inform them about your attendees, the facilities at the site, including audiovisual.
- Notify attendees.
- Make travel arrangements.

AT LEAST 5 WEEKS BEFORE YOUR MEETING

- Confirm menus, room setups and supplies in writing with your catering manager.
- Monitor speakers’ presentation development and offer assistance in reproducing handouts.
- Order signs and printed materials.
- Mail attendees the agendas, suggested dress and other instructions.
- Order gifts and amenities. Arrange delivery of gifts and meeting materials with your sales manager.

AT LEAST 3 WEEKS BEFORE YOUR MEETING

- Check with your speakers, regarding the progress of their presentations, audiovisual and logistical arrangements.
- Submit rooming list to hotel and confirm amenities.

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.
- Make arrangements for shipping materials back to your office after the meeting.
- Confirm your meal and beverage counts for the food functions.
- Take a complete master set of handouts with you just in case your shipment of materials is delayed.

UPON ARRIVAL

- Review details and walk through your meeting space with your catering manager.
- Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition.
- Check the site reader board and registration desk for posted times and locations of your functions.

MEETING DAYS

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

CONCLUDING A SUCCESSFUL MEETING

- Meet with your catering manager to review sessions, charges, and receipts
- Share with your catering manager the names of personnel who have provided extraordinary services.