MEETING/EVENT CHECKLIST

ORGANIZE MEETING NOTES AND MATERIALS AND REVIEW YOUR TIMELINES
Once you’ve established the framework of your meeting and know its general requirements, you’re ready to contact hotels and discuss planning specifics. You’ll 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
- Contacts
- Audiovisual equipment
- Ground transportation
- Meeting room setup
- Budget
- Recreation
- Entertainment
- Rooming list
- VIPs
- Event communications
- Speakers
- Food and Beverage
- Spouse programs

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 necessary hotel rooms
Speak to Meetings Director or Sales Manager 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
Make travel arrangements
Decide on any marketing needs; begin creative development

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

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.

DAY BEFORE MEETING
Review details with Meetings Director or Sales Manager
Inspect all shipped materials
Inspect signage and hotel message boards
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
Sign checks and keep ongoing record of expenses
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)
Inform hotel of guest arrival time so front desk can be properly staffed
Order gifts and amenities
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 Hotel Meetings Representative 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!