

PlanningHelper **SAMPLE**

Overall Event Checklist in Order of Priority

Name of Meeting | Conference | Event | Social Function

Day / Date / Year – Location

Purpose | Objectives

- | | |
|---|--|
| <input type="checkbox"/> Brainstorm topic theme | <input type="checkbox"/> Develop benchmarks and evaluation methods |
| <input type="checkbox"/> Financial goals | <input type="checkbox"/> Develop target list of team leaders |
| <input type="checkbox"/> Program objectives | <input type="checkbox"/> |

Program Development | Speakers

- | | |
|---|---|
| <input type="checkbox"/> Coordinate with Program Committee | <input type="checkbox"/> Verify speaker recruiting assigned to team |
| <input type="checkbox"/> All committees notified of date, location, theme | <input type="checkbox"/> Track speaker acceptance / decline |
| <input type="checkbox"/> Program format and topics outlined | <input type="checkbox"/> Finalize Speaker checklist and timeline |
| <input type="checkbox"/> Preferred speakers identified | <input type="checkbox"/> Finalize Program checklist and timeline |
| <input type="checkbox"/> | <input type="checkbox"/> |

Budget

- | | |
|--|---|
| <input type="checkbox"/> Coordinate through Finance Committee | <input type="checkbox"/> Obtain current quotes from venues, vendors |
| <input type="checkbox"/> Provide prior expense / revenue history | <input type="checkbox"/> Finalize Budget checklist and timeline |
| <input type="checkbox"/> | <input type="checkbox"/> |

Space Requirements | Meetings | Functions | Events | Exhibits

- | | |
|--|--|
| <input type="checkbox"/> Confirm program format with Program Committee | <input type="checkbox"/> Finalize Space Requirement checklist and timeline |
| <input type="checkbox"/> Develop function specifications as initial guidelines | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Location | Destination City | Geographic Area

- | | |
|---|--|
| <input type="checkbox"/> List cities geographical areas to consider | <input type="checkbox"/> Finalize Location checklist and timeline |
| <input type="checkbox"/> List possible resources available in each to contact | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> Make initial inquiries re date and space availability |

Communications

- | | |
|---|---|
| <input type="checkbox"/> Develop overall strategy for pre-event | <input type="checkbox"/> Finalize Communications checklist and timeline |
| <input type="checkbox"/> Develop communication methods for on-site | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> Include risk management / emergency procedures | <input type="checkbox"/> |

Marketing | Promotion

- | | |
|---|--|
| <input type="checkbox"/> Coordinate through Marketing Committee | <input type="checkbox"/> Advance promo for sponsors / exhibitors |
| <input type="checkbox"/> Marketing plan and budget projections | <input type="checkbox"/> Finalize Marketing checklist and timeline for details |
| <input type="checkbox"/> Theme design concept | <input type="checkbox"/> Integrate efforts with Communications |
| <input type="checkbox"/> | <input type="checkbox"/> |

Ethics | Partnerships | Industry Etiquette

- | | |
|--|--|
| <input type="checkbox"/> Review guidelines for publication | <input type="checkbox"/> Determine policy on how to address issues |
| <input type="checkbox"/> | <input type="checkbox"/> |

Sponsors

- | | |
|---|--|
| <input type="checkbox"/> Coordinate through Sponsor Committee | <input type="checkbox"/> Send invoice for payment or agreement to sign |
| <input type="checkbox"/> Track peer-to-peer recruiting assignments | <input type="checkbox"/> Finalize Sponsor checklist and timeline |
| <input type="checkbox"/> Report confirmations received / acknowledged | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Exhibits

- | | |
|---|--|
| <input type="checkbox"/> Type / size of booths available verified | <input type="checkbox"/> Finalize Exhibitor checklist and timeline |
| <input type="checkbox"/> Proposed floor diagram designed | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Facility | Hotel | Venue | RFP | Site Selection

- | | |
|---|---|
| <input type="checkbox"/> Function specifications detailed for venue or facility | <input type="checkbox"/> Finalize RFP Site Visit checklist and timeline |
| <input type="checkbox"/> Make initial inquiries re date and space availability | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Lodging | Overnight Guest Rooms | Accommodations

- | | |
|---|--|
| <input type="checkbox"/> Function specifications for lodging | <input type="checkbox"/> Finalize Lodging checklist and timeline |
| <input type="checkbox"/> Inquiries re date and space availability | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Contracts | Permits

- | | |
|---|---|
| <input type="checkbox"/> Finalize Contract checklist and timeline | <input type="checkbox"/> Insurance status review |
| <input type="checkbox"/> Initiate contracts | <input type="checkbox"/> Permit applications |
| <input type="checkbox"/> Schedule contract review for approval | <input type="checkbox"/> Finalize Insurance Permit checklist and timeline |
| <input type="checkbox"/> | <input type="checkbox"/> |

Audiovisual | Technology

- | | |
|--|--|
| <input type="checkbox"/> Confirm program format with Program Committee | <input type="checkbox"/> Finalize Audiovisual checklist and timeline |
| <input type="checkbox"/> Function specifications for audiovisual | <input type="checkbox"/> Confirm team leader |

Vendors | Service Providers | Entertainment

- | | |
|---|---|
| <input type="checkbox"/> Function specifications for entertainment | <input type="checkbox"/> See Decorations checklist and timeline details |
| <input type="checkbox"/> Function specifications for on-site security | <input type="checkbox"/> See Equipment checklist and timeline details |
| <input type="checkbox"/> Function specifications for equipment rental | <input type="checkbox"/> Confirm team leaders if needed |
| <input type="checkbox"/> | <input type="checkbox"/> |

Recreation | Tours | Attractions

- | | |
|---|---|
| <input type="checkbox"/> Pre- or Post-program tours | <input type="checkbox"/> Family attractions |
| <input type="checkbox"/> Spouse Guest program | <input type="checkbox"/> Golf Other |
| <input type="checkbox"/> | <input type="checkbox"/> |

Transportation: Ground | Air | Shuttle

- | | |
|---|---|
| <input type="checkbox"/> Transportation specifications <input type="checkbox"/> ground <input type="checkbox"/> air | <input type="checkbox"/> Finalize Transportation checklist and timeline |
| <input type="checkbox"/> | <input type="checkbox"/> |

Registration | Advance | On-Site

- | | |
|---|---|
| <input type="checkbox"/> Function specifications for event registration | <input type="checkbox"/> Finalize Registration checklist and timeline |
| <input type="checkbox"/> Target date set to open registration | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Food & Beverage | Catering

- | | |
|--|--|
| <input type="checkbox"/> Function specifications for food and beverage | <input type="checkbox"/> Finalize F&B checklist and timeline |
| <input type="checkbox"/> Catering cost projection | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Set-up for Meetings & Functions | Diagrams | Signage

- | | |
|--|---|
| <input type="checkbox"/> Meeting Function Set-up function specifications | <input type="checkbox"/> Finalize Set-up checklist and timeline |
| <input type="checkbox"/> Floor diagrams | <input type="checkbox"/> Confirm team leader |
| <input type="checkbox"/> | <input type="checkbox"/> |

Onsite Preparation: Logistics | Printing | Staffing | Volunteers | Hospitality

- | | |
|--|---|
| <input type="checkbox"/> Temp personnel scheduled | <input type="checkbox"/> Printing checklist and timeline |
| <input type="checkbox"/> Volunteers and hospitality assigned | <input type="checkbox"/> Signage checklist and timeline |
| <input type="checkbox"/> Security scheduled and stations assigned | <input type="checkbox"/> On-Site prep checklist and timeline |
| <input type="checkbox"/> Orientation rehearsals scheduled | <input type="checkbox"/> On-site tasks checklist and timeline |
| <input type="checkbox"/> Orientation / rehearsals scheduled | <input type="checkbox"/> Supplies Amenities Gifts checklist |
| <input type="checkbox"/> Temp personnel checklist and timeline completed | <input type="checkbox"/> Parking validation and notices |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Wrap-Up | Payments | Reporting | Thank You Letters

- | | |
|---|---|
| <input type="checkbox"/> Acknowledgements Thank you notes | <input type="checkbox"/> Event and Lodging history recorded |
| <input type="checkbox"/> Evaluations and critiques compiled | <input type="checkbox"/> Final payments within 30 days |
| <input type="checkbox"/> | <input type="checkbox"/> |