

Planning Helper **EXAMPLE**

Overall Event Time Line (as though planning for September event in same year)

Illustrating 4 Sort Capabilities for Different Monitoring Purposes

MAIN CATEGORIES: Budget - Exhibits - Logistics - Marketing - Program - Registration - Transportation

SUB-CATEGORIES: Administrative - Destination - Facilities - Food & Beverage - Lodging - Promo - Speakers - Staffing - Vendors - Volunteers

Start Date <small>* See link above</small>	Main Category	Sub-Category	Deadline	Tasks	Notes	Assigned	Current Status
# 1 SORTED BY > Main Category > Start Date							
01/15/00	Budget	Admin	02/01/00	Outline new Budget forecast for September event	See Budget checklist. Prep time line.	Michael	done
02/01/00	Budget	Admin	03/01/00	Submit forecast with new vendor quotes / revenue projections	Waiting for F&B quote.	Michael	partial
04/01/00	Budget	Admin	05/01/00	Submit final budget for approval		Michael	
01/15/00	Exhibits	Facilities	02/01/00	Develop target list of exhibitors / draft preliminary floor plan	See Exhibit checklist. Prep time line.	Adrian	?
01/15/00	Logistics	Destination	02/01/00	Research demographics then destination cities	2nd tier cities preferred. Omaha 1st choice, Kansas City 2nd, Tulsa 3rd.	James	done
02/01/00	Logistics	Facilities	02/15/00	Research venues with both lodging and space under one roof	See site selection checklist. Prep time line, comparison matrix.	Bryan	
02/01/00	Logistics	Lodging	02/15/00	Check convention center availability as backup.	Prep list of potential lodging venues near convention center	Bryan	partial
03/01/00	Logistics	F&B	03/01/00	Request catering policies and sample menus.	See F&B checklist. Prep time line and catering cost matrix.	Cynthia	
02/01/00	Marketing	Promo	02/15/00	Draft 1st promo piece for distribution to full database	Promo schedule approved. Artwork mockups in progress.	Jessica	partial
01/15/00	Program	Admin	02/01/00	Schedule 1st planning meeting.	Objecties, target audience and speakers, theme.	Sharron	done
02/01/00	Program	Volunteers	03/01/00	Select volunteers to spearhead each Program subcommittees	6 of 10 confirmed. See checklist. Prep time line.	Anthony	partial
03/01/00	Program	Speakers	05/15/00	Extend invitations in order of preferred speakers.	Top 3 preferred unavailable. See Speaker checklist. Prep time line.	Roz	partial
				Etc.			

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# 2 SORTED BY > Sub-Category > Start Date							
01/15/00	Program	Admin	02/01/00	Schedule 1st planning meeting.	Objecties, target audience and speakers, theme.	Sharron	done
02/01/00	Budget	Admin	03/01/00	Submit forecast with new vendor quotes / revenue projections	Waiting for F&B quote.	Michael	partial
04/01/00	Budget	Admin	05/01/00	Submit final budget for approval		Michael	
01/15/00	Budget	Admin	02/01/00	Outline new Budget forecast for September event	See Budget checklist. Prep time line.	Michael	done
01/15/00	Logistics	Destination	02/01/00	Research demographics then destination cities	2nd tier cities preferred. Omaha 1st choice, Kansas City 2nd, Tulsa 3rd.	James	done
03/01/00	Logistics	F&B	03/01/00	Request catering policies and sample menus.	See F&B checklist. Prep time line and catering cost matrix.	Cynthia	
01/15/00	Exhibits	Facilities	02/01/00	Develop target list of exhibitors / draft preliminary floor plan	See Exhibit checklist. Prep time line.	Adrian	?
02/01/00	Logistics	Facilities	02/15/00	Research venues with both lodging and space under one roof	See site selection checklist. Prep time line, comparison matrix.	Bryan	
02/01/00	Logistics	Lodging	02/15/00	Check convention center availability as backup.	Prep list of potential lodging venues near convention center	Bryan	partial
02/01/00	Marketing	Promo	02/15/00	Draft 1st promo piece for distribution to full database	Promo schedule approved. Artwork mockups in progress.	Jessica	partial
03/01/00	Program	Speakers	05/15/00	Extend invitations in order of preferred speakers.	Top 3 preferred unavailable. See Speaker checklist. Prep time line.	Roz	partial
02/01/00	Program	Volunteers	03/01/00	Select volunteers to spearhead each Program subcommittees	6 of 10 confirmed. See checklist. Prep time line.	Anthony	partial
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Start Date <small>* See link above</small>	Main Category	Sub-Category	Deadline	Tasks	Notes	Assigned	Current Status
# 3 SORTED BY > Deadline > Main Category							
01/15/00	Budget	Admin	02/01/00	Outline new Budget forecast for September event	See Budget checklist. Prep time line.	Michael	done
01/15/00	Exhibits	Facilities	02/01/00	Develop target list of exhibitors / draft preliminary floor plan	See Exhibit checklist. Prep time line.	Adrian	?
01/15/00	Logistics	Destination	02/01/00	Research demographics then destination cities	2nd tier cities preferred. Omaha 1st choice, Kansas City 2nd, Tulsa 3rd.	James	done
01/15/00	Program	Admin	02/01/00	Schedule 1st planning meeting.	Objecties, target audience and speakers, theme.	Sharron	done
02/01/00	Logistics	Facilities	02/15/00	Submit forecast with new vendor quotes / revenue projections	Waiting for F&B quote.	Michael	partial
02/01/00	Logistics	Lodging	02/15/00	Research venues with both lodging and space under one roof	See site selection checklist. Prep time line, comparison matrix.	Bryan	
02/01/00	Marketing	Promo	02/15/00	Check convention center availability as backup.	Prep list of potential lodging venues near convention center	Bryan	partial
02/01/00	Budget	Admin	03/01/00	Draft 1st promo piece for distribution to full database	Promo schedule approved. Artwork mockups in progress.	Jessica	partial
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03/01/00	Program	Volunteers	03/01/00	Request catering policies and sample menus.	See F&B checklist. Prep time line and catering cost matrix.	Cynthia	
03/01/00	Budget	Admin	05/01/00	Extend invitations in order of preferred speakers.	Top 3 preferred unavailable. See Speaker checklist. Prep time line.	Roz	partial
04/01/00	Program	Speakers	05/15/00	Submit final budget for approval		Michael	
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# 4 SORTED BY > Assigned > Deadline							
01/15/00	Exhibits	Facilities	02/01/00	Develop target list of exhibitors / draft preliminary floor plan	See Exhibit checklist. Prep time line.	Adrian	?
02/01/00	Program	Volunteers	03/01/00	Select volunteers to spearhead each Program subcommittees	6 of 10 confirmed. See checklist. Prep time line.	Anthony	partial
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02/01/00	Logistics	Lodging	02/15/00	Check convention center availability as backup.	Prep list of potential lodging venues near convention center	Bryan	partial
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