Checklist For Conferences

We've compiled this checklist based on years of professional conference planning experience. Please refer to it with our compliments. And if you need assistance, we're always standing by to answer your questions or to lend a hand.



Suggested Tasks

18 – 16 Months Ahead

- [ ] Determine objectives of your event, planning committee and task assignments
- [ ] Establish your needs - Number of attendees, Space requirements, Key dates
- [ ] Establish a preliminary budget and solicit sponsorship
- [ ] City/venue search (several potential options that meet all requirements)
- [ ] Prepare and send Request for Proposal (RFP)
- [ ] Conduct site visits
- [ ] Contract/deposits with chosen venues
- [ ] Determine theme, if any
- [ ] Create a marketing plan, create website and choose registration platform
- [ ] Send "Save the Date" notices via email
- [ ] Begin agenda format planning
- [ ] Decide on special events (like golf outing, excursions, etc.)
- [ ] Additional contracts (like hotel accommodations, transportation, equipment rental)

14 – 12 Months Ahead

- [ ] Prepare session/speaker proposal submission form and distribute
- [ ] Identify and secure speakers and their travel/housing arrangements
- [ ] Begin promoting conference theme, location and registration rates
- [ ] Determine after-hour excursions (receptions, tours, special receptions, etc.) along with any additional pricing to include in registration
- [ ] Compile all information for registration site

10 – 9 Months Ahead

- [ ] Deadline for proposals to be received by review committee
- [ ] Review proposals, select sessions and notify accepted and declined proposers
- [ ] Open registration and housing reservations to attendees

6 – 4 Months Ahead

- [ ] Finalize program, speakers & agenda, update website
- [ ] Determine final print date
- [ ] Review audio-visual availability and needs
- [ ] Prepare “Day of Coordination” list
- [ ] Continue to update us

4 – 3 Months Ahead

- [ ] Contact vendors to begin planning logistics (like A/V, menu, etc.)
- [ ] Prepare session and post-event survey

2 Months – 6 Weeks Ahead

- [ ] Send reminders to speakers
- [ ] Order attendee materials (name tags, portfolios, notebooks, etc.)
- [ ] Finalize special event details (linens, flowers, etc.)

3 – 2 Weeks Ahead

- [ ] Confirm guest/meeting room arrangements, menus and final counts

- [ ] Print signage and distribute printed or digital program
- [ ] Update website
- [ ] Assign session moderators

1 Week Ahead

- [ ] Ship materials to hotel
- [ ] Hold pre-conference meeting and walk-through
- [ ] Send email update to participants/speakers
- [ ] Review all set-ups and A/V needs
- [ ] Develop registration table materials, prepare name badges and gift bags for registration and speakers

During your conference

- [ ] Enjoy! Contact us with any questions that arise

1 week after the conference

- [ ] Send sponsor and VIP thank you letters
- [ ] Send post-event survey
- [ ] Have a post-conference meeting with key players

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