

Meeting & Event Check List



Planning is essential to an event's success! This comprehensive check-list can be adapted to any type of event. How far in advance you need to start planning, depends on how complex the event is.

Good luck!

At the very start

○ Define

- The purpose and objectives of the meeting - to you.
- What will the guests/delegates gain from participating.
- Who will be the members of the planning group/event committee.
- Who is the decision maker(s).
- Who will be there to help on-site.
- What do you want to happen. (Work out a preliminary programme/agenda).
- When do you want it to take place. (Remember to check dates for other events). Can you be flexible on dates.
- Where do you want it to take place. (Consider parking, transportation, accessibility for disabled etc.).
- What is your budget. (Can you get extra funds if needed. Could you get sponsors.).
- Whom do you want to attend. Estimate no. of guests/delegates.
- How long would your event be.
- Do you need to attract guests/delegates by PR. (Develop a relevant media contact list).
- Do you need to insure the event.

○ Determine

- Preferred dates. And available optional dates.
- No., seating format and size of meeting rooms and other facilities needed each day (incl. times).
- Need for breaks, lunches, dinners, receptions etc.
- No. and standard of bed rooms each day.
- Type of guests/delegates.
- Any special requests (e.g. exhibition, stage).
- Budget.
- State your preference packages &/or itemised rates.
- Any other relevant information.
- When you need the offer.
- A rough draft of the programme.

- Inspect the considered event venue(s).
- Consider the offers received:
 - Which facilities will best accommodate your event.
 - Which will best live up to the expectations of the guests/delegates.
 - Whom will be the best partner to work with.
 - Which venue best meets your budget.
- Book the event venue(s) and main services.
- Consider the need for printed material and prepare a timeline for producing it.
- Research speakers according to your desired learning outcomes at the event.**
- Prepare invitations. Allow the guests/delegates to note their individual requirements (dietary, smoking etc.) on the response form.

3 months prior to the event

- Update your reservation (no. of meetings rooms, bed rooms, guests/delegates etc.). (Updating minimizes your cancellation/reduction costs).
- Order signs and printed marketing material.
- Order gifts and amenities.
- Contact your prospective speakers for the event to hold the date and finalize their agreements.**
- Start preparing a scenario (to do list with responsible persons assigned).
- Prepare your event budget. Check budgets from similar meetings to ensure that all is included.
- Consider the unexpected. (E.g. What happens if one of your speakers falls sick.) + prepare contingency plans
- Invite guests/delegates. **Confirm guests/delegates participation.**

1 month prior to the event

- Choose and confirm catering and menus
- Check development of speakers presentation (Remind speakers of presentation due dates, for copying/production of handouts).
- Check and order speakers' technical equipment requirements.
- Check and order speakers' for transportation requirements.
- Finalise of printed material production.
- Send rooming list to the hotel. Remember to note special requests (VIPs etc.).
- Hold a pre-event meeting with your venue contact to go through the programme.
- Prepare press release for your event.

One week prior event

- Send material to arrive at the hotel 48 hours before your arrival.(advise the hotel to expect the material) Make arrangements to return material to your office after the event. Check and order speakers' technical
- Prepare a master copy of all your printed material to bring with you - just in case.
- Confirm all deliveries and pick-ups.
- Prepare name badges.
- Send out your event press release. Call up contacts to get confirmation of coverage.
- If you are using your own AV, check that it functions and that you have all necessary cords, plugs etc.
- Prepare a staff briefing kit (programme, scenario, contact telephone list etc.).
- Advise the event venue (and other relevant suppliers) , who has the authority to sign bills and order any extras.

Upon arrival at the venue / 1 day before event

- Hold a pre-event meeting with your venue contact to go through the programme.
- Personally check that all material has arrived and is in good condition.
- Aim at getting to bed early - and get a good start!

1 hour before event

- Check all event rooms, AV set ups and venue operations
- Meet with all speakers to go over their presentations and any last minute surprises.

Make sure that all greeters, helpers etc. are on-site, briefed and ready to go.

During the event

- Relax, smile and have a great event!

After the event

- Meet with your venue contact to review the event. (Present you feed-back and feed-forward).
- Fill out the event evaluation form evaluation.
- Check the invoices.
- Pay the invoices from suppliers.
- Send thank-you notes to the speakers, sponsors, staff etc.
- Make notes for the next event.