



Meeting Planning Sample Timeline

One critical success strategy to any meeting or event is advance planning, which requires constructing a schedule and sticking to it. There are too many things to remember, so use this sample timeline to help plan and execute your event.

4 – 6 Months Before Event	Target Date	Completion Date
<ul style="list-style-type: none"> • Confirm # of attendees • Set budget • Site inspections • Book venue • Book entertainment • Book keynote speakers • Set preliminary agenda • Start collecting phone numbers, e-mails and addresses of participants • Decide on theme • Hire photographer/videographer 	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____
2 – 3 Months Before Event	Target Date	Completion Date
<ul style="list-style-type: none"> • Assemble the meeting or event package (the announcement with registration form, agenda, the venue and other information participants will need) • Send out invitations and/or registration package • Confirm speakers and panelists • Contact caterers • Contact wine & spirits suppliers • Contact florist • Confirm AV requirements • Contact AV and computer specialists • Order corporate gifts or other giveaways 	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____
1 – 2 Months Before Event	Target Date	Completion Date
<ul style="list-style-type: none"> • Make sure all contracts are signed • Review with legal counsel • Review speakers' assignments • Review all menus, room setups etc. • Review equipment list with participants • Start assembling ideas for the registration kits, badges, agendas, vouchers, timetables, leisure activity suggestions • Put appropriate literature in each kit • Finalize all menus • Finalize decor and floral arrangements 	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____
1 Month Before Event	Target Date	Completion Date
<ul style="list-style-type: none"> • Rehearse format with the venue, and decide on room setups, podia, etc. • Make sure enough electrical outlets are available, as well as the necessary cabling for equipment • If you're using a hotel, decide with hotel management what welcome basket will be in each room • Alert hotel who your VIPs are • Confirm guest list 	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____	____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____



10 Days Before Event	Target Date	Completion Date
<ul style="list-style-type: none">• Do a checklist one more time to make sure nothing has slipped through the cracks• One more time, do an accurate guest list• Prepare seating charts	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>
The Day Before Event	Target Date	Completion Date
<ul style="list-style-type: none">• Go over checklist again• Arrange cash for gratuities, etc.• Review duties with staff members or hired help• Make sure signage and directions are completed• Prepare one-sheet "hot list" of critical phone numbers• Confirm any outside vendors (e.g. AV specialist)• Assemble all delegate materials	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>
Day 1 of Event	Target Date	Completion Date
<ul style="list-style-type: none">• Bring your checklists and this Workbook with you• Bring you Planner's Tool Kit• Have the attendee list, properly alphabetized, ready at the reception table, together with name tags• Bring extra name tags• Finalize head count for every event• Set out table numbers and name tags according to your seating charts• Solicit business cards from on-site staff, including cell phone numbers	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>
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