

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 	__/__/__ __/__/__ __/__/__	__/__/__ __/__/__ __/__/__
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 	__/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__	__/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__
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 	__/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__	__/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__ __/__/__

After Event Concludes:	TARGET DATE	COMPLETION DATE
<ul style="list-style-type: none">• Pay the bills• Write thank-yous and send gifts• Complete your expenditures and match to budget• Pay gratuities	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>	<div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div> <div>___/___/___</div>
Notes:		
<div><ul style="list-style-type: none">•••••••••••••••••••</div>		