



Meeting Planner



Checklist

Tear it out and say

"I got it from *Midwest Meetings!*"

Define Meeting/Event

- Goals and objectives _____
- _____
- Type of meeting (team building, planning, etc.) _____
- _____
- Decide whether formal or informal _____
- Meeting theme, if any _____
- Number of potential attendees _____

Establish Budget

- Master accounts _____
- Deposit accounts _____
- Set registration fees _____
- Expenses:
 - Printing _____
 - Speaker fees _____
 - Mailing and postage _____
 - Entertainment _____
 - Exhibit space _____
 - Meals _____
 - Signs and decorations _____
 - Extra help _____
 - Beverages and snacks _____
 - Transportation _____
 - Other expenses _____
 - Total expenses _____
- Income:
 - Registration fees _____
 - Exhibit space rental _____
 - Override on functions _____
 - Contributions _____
 - Other financing _____
 - Total income _____

Set Timeframe

- Length of meeting _____
- First, second and third choice meeting dates _____
- _____
- _____

Establish Meeting Content

- Programs _____
- Speakers and presenters _____
- Entertainment _____
- Tentative agenda _____
- Audiovisual requirements _____
- Companion/spouse program _____
- Security needs _____
- Signage and decorations _____

Exhibits

- Allocate booth space _____
- Exhibitor policies and costs _____
- Exhibit hours _____
- Setup and teardown times _____
- Cartage firm _____
- Freight shipping and receiving guidelines for exhibitors _____
- _____
- Storage for early shipments _____
- Insurance and liability _____
- Food and beverage _____

Attendance Promotion

- Attendance goals _____
- Prepare meeting program and schedule _____
- Pre-meeting press releases _____
- Pre-meeting advertisements _____
- Exhibitor solicitation materials _____
- Meeting announcements _____
- Initial and follow-up mailings _____

Select Hotel/Venue

- Establish hotel/venue contact person _____
 - Phone _____ Fax _____
 - Email _____
- Tax-exempt certificates if applicable _____
- Meeting rooms
 - Sq. ft. needed _____
 - Number of rooms available _____
 - Type of rooms _____
 - Setups to be used _____
 - Audiovisual needs _____
 - Cost _____
 - Lighting _____
 - Ventilation _____
 - Desired amenities _____
 - _____
 - _____
 - Access _____
- Exhibit space
 - Sq. ft. needed _____
 - Number of rooms available _____
 - Audiovisual needs _____
 - Cost _____
 - Storage _____
 - Drayage _____
 - Access _____
 - Ventilation _____
 - Ceiling height _____
 - Lighting _____
 - Utilities _____
 - Decorating _____

