Meeting Planner Timeline

18 Months Out
• Set objectives, meeting/exhibit dates and locale
• Set preliminary budget
• Set registration fees and policy
• Conduct site visit
• Check site references from other meeting planners
• Negotiate fares with official airline
• Select ground operator
• Select official car-rental agency
• Define promotional strategy
• Assemble potential exhibitor lists
• Prepare first calendar notices and press releases
• Contact CVBs, hotels and conference centers

16 Months Out
• Establish meeting theme and objectives
• Negotiate hotel rates and blocks, sign hotel contracts
• Select freight company
• Select exhibit service contractor
• Produce exhibit floor plan
• Establish exhibit space rates
• Arrange insurance coverage
• Contact speaker’s bureau to check on availabilities/fees

14 Months Out
• Prepare budget/receive approval
• Invite and confirm key speakers
• Determine preliminary food and beverage requirements
• Prepare and mail first meeting announcements and promotional materials to prospective attendees
• Prepare program agenda
• Mail first exhibitor promotion

12 Months Out
• Select and contract with audiovisual supplier
• Develop logo/graphics theme
• Get speakers’ audiovisual needs
• Adjust exhibit floor plan
• Issue new media release
• Produce and mail new promotion to prospective attendees

6 Months Out
• Create checklist for all meeting segments
• Order and confirm delivery date of materials/giveaways
• Select photographer, entertainment, and security vendor
• Arrange for on-site office and communications needs
• Begin processing registration forms
• Determine participants: facilitators, dignitaries etc.
• Solicit sponsors and confirm in writing

4 Months Out
• Book your headliner entertainment
• Develop meeting requirements and times for meal functions, receptions, special activities, exhibits and tours
• Mail next promotion piece to prospective attendees

3 Months Out
• Issue new media release
• Refine program and agenda
• Select photographer, entertainment, and security vendors
• Determine materials shipping arrangements
• Order and confirm delivery date of giveaways
• Assign speaker locations/times
• Confirm audiovisual requirements
• Plan meeting sessions that include topics and rooms
• Determine transportation needs of participants
• Determine meal selection and pricing
• Finalize the specific meeting rooms and layouts required
• Have all decisions finalized in contractual form

2 Months Out
• Adjust budget again
• Open host-city bank account
• Finalize session schedule and room assignments
• Produce and mail exhibitor services kits
• Finalize F&B schedule
• Determine on-site staff needs
• Determine security needs
• Compile exhibitor directory
• Review processing and billing activity with hotels
• Plan social events with local clubs and restaurants
• Confirm agenda with speakers and presenters
• Confirm presentation needs with site manager
• Mail speakers and/or presenters their travel and registration information and preliminary agendas
• Finalize meal selection/confirm site details
• Reconfirm with all external vendors
• Send attendees information regarding meeting attire, agenda, hotel and travel arrangements
• Mail final promotional piece to prospective attendees

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**Meeting Planners Timeline**

1 Month Out
- Print final program and conference guide
- Print workbooks
- Check cut-off date for sleeping room bookings at hotel
- Request room pick-up list
- Submit daily schedule to hotels
- Produce badge and ticket stocks
- Contact all speakers to confirm
- Submit final room list to the site manager
- Arrange business center for participants, if appropriate
- Create tent cards that have daily agendas on the back
- Create name badges
- Create meeting handouts in hard copy and electronic
- Send attendees information about the meeting, participation requirements and facilities
- Mail final registration information, travel plans and updated agendas
- Cut off date for guarantee numbers for special activities such as golf outings or family tours
- Organize registration materials

2 Weeks Out
- Ship materials to meeting site and confirm delivery
- Prepare name badges for all attendees
- Make pre-event preparations onsite
- Prepare registration list with count of registrants
- Finalize food arrangements
- Mail press release to all local press
- Review any updates or changes with site manager
- Confirm number of attendees with hotel and caterer

1 Week to 1 Day
- Check inventory of materials shipped in advance
- Hold a pre-convention meeting: Review last-minute changes to conference résumé, including guarantees, and remind facility staff of importance of meeting
- Meet with facility accounting department to confirm procedures for daily review of charges to master account and prepare final accounting and auditing report of all charges
- Confirm information to be posted on reader boards
- Meet with security and review procedures
- Review rooming list with front desk and confirm all pre-registered attendees and procedure for check-in; inspect rooms assigned to VIPs and to attendees requiring rooms meeting ADA standards
- Check weather reports for arrival delays and review alternate plans; coordinate airport meet-and-greet plans
- Coordinate specific times for guest room delivery of any meeting materials and/or gifts for VIPs
- Set up private office space and separate registration area
- Review any updates or changes with site manager
- Set up registration tables with attendee materials
- Re-check accommodations list and meeting room needs
- Set up signage, banners and tent cards in the meeting rooms
- Check audiovisual equipment

Meeting Day
- Post direction signs and large posters outside rooms
- Set up a registration table one hour before meeting
- Appoint staff to greet speakers as they arrive
- Appoint staff to greet press members
- Appoint clean-up committee
- Welcome attendees
- Distribute name badges, final agendas and materials
- Check audiovisual equipment before presentation begins
- Distribute giveaways
- Confirm meal timing
- Plan separate post-meeting follow-ups with your own staff and facility staff and issue specific gratuities

Post Meeting
- Reconcile finances
- Do a post-budget performance review
- Ensure all costs have been covered: food, printing, etc.
- Finalize budget report, including actual costs and revenues
- Complete payment for site, speakers and other services
- Prepare invoices for sponsors and unpaid attendees
- Pack and inventory materials
- Have leftover materials shipped back to office
- Send thank you notes to speakers and presenters
- Send thank you notes to facility and to personnel that went above and beyond to ensure success of meeting
- Send thank you notes to VIP’s for their attendance where appropriate
- Review meeting evaluations
- Document meeting notes, prices, vendors and suggestions for future meetings
- Print final registration list including onsite registrants
- Request a sleeping room pick-up summary from hotel

The Meeting Planners Timeline is a combination of information obtained through various meeting planners, publications, magazines and internet research.

The Meeting Planners Timeline is meant to be used as an abbreviated general guide for the decision-making timeline process. The guide should be modified depending on experience of planner and size of meeting.