

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

- 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

4 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

3 Months Out

- Determine what materials need to be reproduced
- Obtain permission for any material you intend to copy
- Plan and arrange airport arrival needs for meet-and-greet
- Mail new promotional piece to prospective attendees
- Send invitation letters to VIPs
- Determine materials needed in registration packet
- Determine meeting room setups and notify site
- Order necessary signs, banners and room signage

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



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 **AP**

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.