

# Meeting & Event Check List



Planning is essential to an event's success! This comprehensive check-list can be adapted to any type of event. How far in advance you need to start planning, depends on how complex the event is.

**Good luck!**

## At the very start

### ○ Define

- The purpose and objectives of the meeting - to you.
- What will the guests/delegates gain from participating.
- Who will be the members of the planning group/event committee.
- Who is the decision maker(s).
- Who will be there to help on-site.
- What do you want to happen. (Work out a preliminary programme/agenda).
- When do you want it to take place. (Remember to check dates for other events). Can you be flexible on dates.
- Where do you want it to take place. (Consider parking, transportation, accessibility for disabled etc.).
- What is your budget. (Can you get extra funds if needed. Could you get sponsors.).
- Whom do you want to attend. Estimate no. of guests/delegates.
- How long would your event be.
- Do you need to attract guests/delegates by PR. (Develop a relevant media contact list).
- Do you need to insure the event.

### ○ Determine

- Preferred dates. And available optional dates.
- No., seating format and size of meeting rooms and other facilities needed each day (incl. times).
- Need for breaks, lunches, dinners, receptions etc.
- No. and standard of bed rooms each day.
- Type of guests/delegates.
- Any special requests (e.g. exhibition, stage).
- Budget.
- State your preference packages &/or itemised rates.
- Any other relevant information.
- When you need the offer.
- A rough draft of the programme.

- Inspect the considered event venue(s).
- Consider the offers received:
  - Which facilities will best accommodate your event.
  - Which will best live up to the expectations of the guests/delegates.
  - Whom will be the best partner to work with.
  - Which venue best meets your budget.
- Book the event venue(s) and main services.
- Consider the need for printed material and prepare a timeline for producing it.
- Invite speakers
- Prepare invitations. Allow the guests/delegates to note their individual requirements (dietary, smoking etc.) on the response form.

## 3 months prior to the event

- Update your reservation (no. of meetings rooms, bed rooms, guests/delegates etc.). (Updating minimizes your cancellation/reduction costs).
- Order signs and printed material.
- Order gifts and amenities.
- Start preparing a scenario (to do list with responsible persons assigned).
- Prepare your event budget. Check budgets from similar meetings to ensure that all is included.
- Consider the unexpected. (E.g. What happens if one of your speakers falls sick.) + prepare contingency plans
- Invite guests/delegates.
- Confirm guests/delegates participation.

## 1 month prior to the event

- Choose and confirm catering and menus
- Check development of speakers presentation (Remind speakers of presentation due dates, for copying/production of handouts).
- Check and order speakers' technical equipment requirements.
- Check and order speakers' for transportation requirements.
- Finalise of printed material production.
- Send rooming list to the hotel. Remember to note special requests (VIPs etc.).
- Hold a pre-event meeting with your venue contact to go through the programme.
- Prepare press release for your event.

## One week prior event

- Send material to arrive at the hotel 48 hours before your arrival.(advise the hotel to expect the material)
- Make arrangements to return material to your office after the event.      Check and order speakers' technical
- Prepare a master copy of all your printed material to bring with you - just in case.
- Confirm all deliveries and pick-ups.
- Prepare name badges.
- Send out your event press release. Call up contacts to get confirmation of coverage.
- If you are using your own AV, check that it functions and that you have all necessary cords, plugs etc.
- Prepare a staff briefing kit (programme, scenario, contact telephone list etc.).
- Advise the event venue (and other relevant suppliers) , who has the authority to sign bills and order any extras.

## Upon arrival at the venue / 1 day before event

- Hold a pre-event meeting with your venue contact to go through the programme.
- Personally check that all material has arrived and is in good condition.
- Aim at getting to bed early - and get a good start!

## 1 hour before event

- Check all event rooms.
- Make sure that all greeters, helpers etc. are on-site, briefed and ready to go.

## During the event

- Relax, smile and have a great event!

## After the event

- Meet with your venue contact to review the event. (Present you feed-back and feed-forward).
- Fill out the event evaluation form.
- Check the invoice.
- Pay the invoices from suppliers.
- Send thank-you notes to the speakers, sponsors, staff etc.
- Make notes for the next event.