

Organize meeting notes and materials and review your timelines

Once you've established the framework of your meeting and know its general requirements, you're ready to contact hotels and discuss planning specifics. You'll find it helpful to set up an organizer with sections for the various planning steps, so you can keep all the meeting information in one place. Some suggested section titles include:

- Schedules
- Budget
- Contacts
- Rooming list
- Ground transportation
- Event communications
- Meeting room setups
- Audiovisual equipment
- Food and Beverage
- Recreation
- Speakers
- Entertainment
- Spouse programs
- VIPs

Timeline



These are general guidelines to keep in mind concerning what needs to be done and when. You may be on a tighter deadline, or have luxurious amounts of time (lucky!). Generally, you should start planning three months in advance, so your attendees can arrange their schedule and speakers can begin to prepare their presentations and you can relax a bit. Every program is different, so adapt this timeline as needed.

3 to 5 months out

- Determine the objective of your meeting
- Get your budget approved
- Check calendar of events taking place near your desired venue to avoid conflicts
- Book meeting site and necessary hotel rooms
- Speak to Meetings Director or Sales Manager about menus and meeting room needs
- Set up master account for meeting charges and determine who can sign for charges
- Invite speakers and provide scope of desired presentation
- Invite attendees
- Make travel arrangements
- Decide on any marketing needs; begin creative development

At least a month before event

- Confirm menus, room setups and supplies in writing with your Meetings Director
- Reach out to speakers to check on their presentations (they'll likely need urging)
- Inform hotel what time guests will arrive so front desk can be properly staffed
- Order gifts and amenities
- Order signs and printed materials
- Introduce any marketing materials into market
- Mail attendees the agenda and any brochures; suggest a dress code and times for arrival

3 weeks before meeting

Check in with speakers again; offer assistance with A/V and handouts
Reconfirm quantity of hotel rooms needed and reconfirm amenities

1 week before meeting

Ship materials to location so that they arrive AT LEAST 24 hours before your arrival
Confirm all outside equipment orders (like A/V)
Make arrangements for shipping materials back to your office after event
Finalize food and beverage counts for the first day of events
Finalize needs for outside tickets/entertainment sources
Take a master copy of all handouts and brochures; in a pinch, you can arrange to have them copied
Take a deep breath; you're almost there

Day before meeting

Review details with Meetings Director or Sales Manager
Inspect all shipped materials
Inspect signage and hotel message boards
Ensure rooms have proper amenities
Relax; everything will be great!

Meeting day(s)

Check all function spaces one hour before use
Notify Meetings Director immediately of any changes
Meet with Meetings Director every afternoon/evening to go over itemized costs for the day
Sign checks and keep ongoing record of expenses
Be available for attendees; be patient if they offer advice or criticism (it's been known to happen); thank them warmly for compliments



Wrap up

Sit down with Meetings Director to review all your sessions and your charges
Be sure to praise the performance of staff who have provided exceptional service
Consider circulating a survey to attendees or a feedback form to assess success of event and areas of improvement for next time. Pat yourself on the back: Nice job!