CONFERENCE CHECKLIST

Use this timeline to help keep you organized. If you have questions, please contact us.

16 months ahead
• Determine objectives of your event
• Establish your needs
• Number of attendees
• Space requirements
• Key dates
• Establish a preliminary budget and solicit sponsorship
• City/venue search (several potential options that meet all requirements)
• Prepare and send Request for Proposal (RFP)
• Conduct site visits
• Contract/deposits with chosen venues
• Determine theme, if any
• Create a marketing plan, create website and choose registration platform
• Send “Save the Date” notices via email
• Begin agenda format planning
• Decide on special events (like excursions)
• Additional contracts (like hotel accommodations, transportation, equipment rental)

12 months ahead
• Prepare session/speaker proposal submission form and distribute
• Identify and secure speakers and their travel/housing arrangements
• Begin promoting conference theme, location and registration rates
• Determine after-hour excursions (receptions, tours, special receptions, etc.) along with any additional pricing to include in registration
• Compile all information for registration site

9 months ahead
• Deadline for proposals to be received by review committee
• Review proposals, select sessions and notify accepted and declined proposers
• Open registration and housing reservations to attendees

4 months ahead
• Finalize program, speakers & agenda, update website
• Determine final print date
• Review audio-visual availability and needs
• Prepare “Day of Coordination” list
• Continue to update us

3 months ahead
• Contact vendors to begin planning logistics (like A/V, menu)
• Prepare session and post-event survey

6 weeks ahead
• Send reminders to speakers
• Order attendee materials (name tags, portfolios, notebooks, etc.)
• Finalize special event details (linens, flowers, etc.)

2 weeks ahead
• Confirm guest/meeting room arrangements, menus and final counts
• Print signage and distribute printed or digital program
• Update website
• Assign session moderators

1 week ahead
• Ship materials to location
• Hold pre-conference meeting and walk-through
• Send email update to participants/speakers
• Review all set-ups and A/V needs
• Develop registration table materials, prepare name badges and gift bags for registration and speakers

During your conference
• Enjoy! Contact us with any questions that arise

1 week after the conference
• Send sponsor and VIP thank you letters
• Send post-event survey
• Have a post-conference meeting with key players