



MEETING PLANNING CHECKLIST

Planning an event requires considerable attention to detail. This checklist may assist in developing your future meetings. For larger meetings, it is recommended that you book up to 6 weeks before arrival.

(Note: the larger the group, the earlier these steps should be taken.)

- Determine the meeting objectives with key decision maker(s), clarify the needs of the participants and develop a tentative agenda and theme that enhances your meeting objectives.
- Determine the financial budget for the meeting.
- Confirm requirements with key internal decision makers.
- Determine number of attendees and guest rooms and include staff and speakers in your count.
- Contact hotel convention manager to determine guest room availability, hotel services and rates.
- Set up a meeting date with convention manager to discuss requirements, site inspection, etc.
- Secure hotel rooms and convention, meeting or banquet space, audio/visual equipment and menu choices.
- Order gifts for speaker or any other VIP and arrange delivery with the hotel.
- Set pre and post programs, if required.
- Determine need for spousal/guest/youth programs and ask for recommendations.
- Communicate with attendees re specific dates, dress code, registration policy, and meal/room requirements.
- Determine convention/meeting representative and signing authority within the company.
- Discuss the following items with convention manager:

Decorator

Entertainment

Interpreter

On-site personnel

Photographer

Shuttle, limousine, car rental

Customs broker

Florist

Delivery/moving company

Outside security

Printer

Technology specialist

- Develop VIP and protocol guidelines, and additional guidelines for special conditions.