

## PLANNING TIMELINE

This timeline provides a checklist for your program. Adapt it to your own particular needs—establish your own “ideal” and “can’t-miss” due dates.

### FROM 3 MONTHS OUT, OR AT TIME OF BOOKING

- Determine the objective of the meeting and develop the program and budget.
- Book meeting site and support services. (Check calendar of local events to avoid conflicting or inappropriate dates.)
- Send letters of agreement to hotel and suppliers.
- Set up master account for your meeting charges with the hotel (authorize who can sign charges).
- Invite speakers and inform them about your attendees and the facilities of the hotel, including audiovisual capabilities.
- Notify attendees.
- Make travel arrangements.

### AT LEAST 5 WEEKS BEFORE YOUR MEETING

- Confirm menus, room setups and supplies in writing with your event manager.
- Monitor speakers' presentation development and offer assistance in reproducing any handouts.
- Order signs and printed materials.
- Mail attendees the agendas, suggested dress and other instructions.
- Order gifts and amenities. Arrange deliveries of gifts (and meeting registration materials) with your hotel contact.

### AT LEAST 3 WEEKS BEFORE YOUR MEETING

- Check with your speakers regarding the progress of their presentations, audiovisual and logistical arrangements.
- Submit rooming list to hotel and confirm arrangements for amenities.

### AT LEAST 1 WEEK BEFORE YOUR MEETING

- Ship materials to arrive 24 hours before your arrival, and confirm arrival before leaving your office.
- Confirm all audiovisual requirements and produce slides.
- Make arrangements for shipping materials back to your office after the meeting.
- Confirm (72 hours in advance) your meal and beverage counts for the first day food functions.
- Take a complete master set of all handouts with you. (If your shipment of materials is lost or delayed, you can arrange to have your master set photocopied.)

### UPON ARRIVAL

- Review details and walk through your meeting space with your property event manager.
- Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition.
- Check the hotel function board and front desk for posted times and locations of your functions.

### MEETING DAYS

- Check function space one hour in advance.
- Notify your event manager immediately of any changes in your plans or requirements.
- Sign banquet checks each day and keep an ongoing record of your on-site expenses.

### CONCLUDING A SUCCESSFUL MEETING

- Meet with your event manager to review your sessions, charges and receipts.
- Share with your event manager the names of personnel who have provided extraordinary service.