

CHRONOLOGICAL PLANNING CHECKLIST

PRELIMINARY (ALLOW 18-24 MONTHS)	CHECK
Set objectives of meeting, convention or exhibition.	
List topics to be covered.	
Choose an appropriate theme.	
Appoint a conference co-ordinator or investigate professional help.	
Set dates and times – avoid holidays and clashes with other events.	
Determine the number of delegates.	
Make initial bookings with venues and accommodation.	
Liaise and negotiate with airlines.	
BUDGET (ALLOW 18-24 MONTHS)	CHECK
Prepare budget estimates and cash flow, taking note of income streams such as registration fees, deposit requirements on venues, accommodation etc.	
Review and update budget regularly.	
Prepare final costs and budget report.	
SPONSORSHIP (ALLOW 12-18 MONTHS)	CHECK
Prepare list of sponsorship prospects.	
Prepare a sponsorship proposal and source financial support.	

ADMINISTRATION (ALLOW 12-18 MONTHS)	CHECK
Establish a computerised mailing list and registration database.	
Design and distribute a registration brochure.	
Set up sub-committees and recruit volunteers to co-ordinate event specifics.	
Record all statistics eg. attendance, income etc.	
Ensure all on-site staff are qualified and competent.	
Determine the number of delegates.	
Co-ordinate registration and management of facilities.	
Engage contractors eg. Exhibition management, PR/Marketing agencies.	

VENUE (ALLOW 12-18 MONTHS)	CHECK
Inspect a suitable venue based upon the size of the conference, budget, location and meeting requirements.	
Ensure accessibility to venue via public transport, taxis, private vehicle charter etc.	
Reserve meeting rooms, exhibition space and dining facilities.	
Survey local dining, shopping, attractions and recreation opportunities for delegates.	

ACCOMMODATION (ALLOW 6-12 MONTHS)	CHECK
Check availability of accommodation for delegates close to venue.	
Consider delegate budgets and selection of accommodation.	
Negotiate and book room blocks.	

PROMOTION (ALLOW 3-6 MONTHS)	CHECK
Engage promotional activities such as teasers, early bird incentives, newspapers, upcoming events, conferences and via the internet.	
Arrange appropriate signage and advertising.	
Produce and distribute publicity kits, promotional material and press releases.	
Instigate a public relations program.	
Liaise with media before, during and after the event.	

SOCIAL PROGRAMS AND TOURING (ALLOW 6-9 MONTHS)	CHECK
Develop touring program, including itineraries and events.	
Investigate professional assistance in handling touring program.	
Co-ordinate touring transport, guides and accommodation.	

EVENT SUPPLIES AND ACCESSORIES (ALLOW 3 MONTHS)	CHECK
Acquire and distribute all materials necessary for the conference eg. stationery, name tags, satchels etc.	
Co-ordinate displays, stands, and technological requirements for the event.	
Engage and brief temporary staff for event co-ordination.	

FINAL CONFIRMATIONS (ALLOW 1-3 MONTHS)	CHECK
Confirm registrations including travel, accommodation and social programs.	
Confirm final delegate numbers to hotels, venues and transport operators.	
Release unwanted hotel rooms.	
Select menus and confirm catering numbers.	
Confirm AV and meeting room set-up / requirements.	
Commence event briefings for suppliers, contractors, venues, and service providers.	

POST EVENT	CHECK
Prepare final costs and budget report.	
Write a post-event evaluation for client.	
Send acknowledgments and thanks to speakers, suppliers, venues and sponsors	
Recover and plan for your next event in Melbourne!	

Find us online and on social media

