

Meeting Planning Checklist

10-12 Months Out:

- Determine meeting goals/objectives
- Identify possible dates for the meeting
- Prepare preliminary agenda
- Research venue options
- Set dates after obtaining meeting dates from other related organizations to avoid conflict
- Negotiate hotel rates and block; agree on and sign hotel contract

8-10 Months Out:

- Prepare “Save-the-Date” email blast
- Start talks with sponsors
- Set budget

6-8 Months Out:

- Establish registration fee (non-member and member)
- Invite and confirm speakers
- Negotiate menus/prices
- Start working on brochure and/or registration form

4-6 Months Out:

- Mail brochure/reg form
- Finalize food/beverage requirements

3-4 Months Out:

- Send 2nd email blast
- Review and confirm session schedule and meeting-room diagram with hotel
- Prepare meeting evaluation forms
- Obtain AV needs from speakers
- Review hotel contract deadlines

2 Months Out:

- Reconfirm speakers
- Send final agenda to sponsors
- Assign on-site responsibilities

1 Month Out:

- Send final email blast reminder

2 Weeks Out:

- Finalize food/beverage guarantees

- Prepare badges for attendees
- Create registration packets including handouts

1 Week Out:

- Final check with hotel contact

2 Months After:

- Send thank you cards to speakers, sponsors and VIPs
- Send final attendance list to CUES
- Send evaluation results to CUES
- Send copy of registration packet and handouts to CUES