



# Meeting Planner



## Checklist

### Define Meeting/Event

- ☐ Goals and objectives \_\_\_\_\_
- ☐ Type of meeting (team building, planning, etc.) \_\_\_\_\_
- ☐ Decide whether formal or informal \_\_\_\_\_
- ☐ Meeting theme, if any \_\_\_\_\_
- ☐ Number of potential attendees \_\_\_\_\_

### Establish Budget

- ☐ Master accounts \_\_\_\_\_
- ☐ Deposit accounts \_\_\_\_\_
- ☐ Set registration fees \_\_\_\_\_
- ☐ Expenses:
  - Printing \_\_\_\_\_
  - Speaker fees \_\_\_\_\_
  - Mailing and postage \_\_\_\_\_
  - Entertainment \_\_\_\_\_
  - Exhibit space \_\_\_\_\_
  - Meals \_\_\_\_\_
  - Signs and decorations \_\_\_\_\_
  - Extra help \_\_\_\_\_
  - Beverages and snacks \_\_\_\_\_
  - Transportation \_\_\_\_\_
  - Other expenses \_\_\_\_\_
  - Total expenses \_\_\_\_\_
- ☐ Income:
  - Registration fees \_\_\_\_\_
  - Exhibit space rental \_\_\_\_\_
  - Override on functions \_\_\_\_\_
  - Contributions \_\_\_\_\_
  - Other financing \_\_\_\_\_
  - Total income \_\_\_\_\_

### Set Timeframe

- ☐ Length of meeting \_\_\_\_\_
- ☐ First, second and third choice meeting dates \_\_\_\_\_

### Establish Meeting Content

- ☐ Programs \_\_\_\_\_
- ☐ Speakers and presenters \_\_\_\_\_
- ☐ Entertainment \_\_\_\_\_
- ☐ Tentative agenda \_\_\_\_\_
- ☐ Audiovisual requirements \_\_\_\_\_
- ☐ Companion/spouse program \_\_\_\_\_
- ☐ Security needs \_\_\_\_\_
- ☐ Signage and decorations \_\_\_\_\_

### Exhibits

- ☐ Allocate booth space \_\_\_\_\_
- ☐ Exhibitor policies and costs \_\_\_\_\_
- ☐ Exhibit hours \_\_\_\_\_
- ☐ Setup and teardown times \_\_\_\_\_
- ☐ Cartage firm \_\_\_\_\_
- ☐ Freight shipping and receiving guidelines for exhibitors \_\_\_\_\_
- ☐ Storage for early shipments \_\_\_\_\_
- ☐ Insurance and liability \_\_\_\_\_
- ☐ Food and beverage \_\_\_\_\_

### Attendance Promotion

- ☐ Attendance goals \_\_\_\_\_
- ☐ Prepare meeting program and schedule \_\_\_\_\_
- ☐ Pre-meeting press releases \_\_\_\_\_
- ☐ Pre-meeting advertisements \_\_\_\_\_
- ☐ Exhibitor solicitation materials \_\_\_\_\_
- ☐ Meeting announcements \_\_\_\_\_
- ☐ Initial and follow-up mailings \_\_\_\_\_

### Select Hotel/Venue

- ☐ Establish hotel/venue contact person \_\_\_\_\_
  - Phone \_\_\_\_\_ Fax \_\_\_\_\_
  - Email \_\_\_\_\_
- ☐ Tax-exempt certificates if applicable \_\_\_\_\_
- ☐ Meeting rooms
  - Sq. ft. needed \_\_\_\_\_
  - Number of rooms available \_\_\_\_\_
  - Type of rooms \_\_\_\_\_
  - Setups to be used \_\_\_\_\_
  - Audiovisual needs \_\_\_\_\_
  - Cost \_\_\_\_\_
  - Lighting \_\_\_\_\_
  - Ventilation \_\_\_\_\_
  - Desired amenities \_\_\_\_\_
- ☐ Exhibit space
  - Sq. ft. needed \_\_\_\_\_
  - Number of rooms available \_\_\_\_\_
  - Audiovisual needs \_\_\_\_\_
  - Cost \_\_\_\_\_
  - Storage \_\_\_\_\_
  - Drayage \_\_\_\_\_
  - Access \_\_\_\_\_
  - Ventilation \_\_\_\_\_
  - Ceiling height \_\_\_\_\_
  - Lighting \_\_\_\_\_
  - Utilities \_\_\_\_\_
  - Decorating \_\_\_\_\_

- ☐ Breakout rooms available \_\_\_\_\_
- ☐ Specify ADA accessibility needs
- Sign language interpreter \_\_\_\_\_
- Sight-impaired accommodations \_\_\_\_\_
- Wheelchair accessibility \_\_\_\_\_
- ☐ Accessibility/local transportation \_\_\_\_\_
- ☐ Parking
- Free or Rate: \_\_\_\_\_
- ☐ Appearance
- Inside   1   2   3   4   5   (5=best)
- Outside 1   2   3   4   5
- ☐ Sleeping rooms
- Rates \_\_\_\_\_
- Number available \_\_\_\_\_
- ☐ Business services available (fax, voicemail, etc.)
- \_\_\_\_\_
- ☐ Construction/renovations planned during meeting \_\_\_\_\_
- ☐ Other events at the venue during meeting \_\_\_\_\_

## Transportation

## Security

### Arrange Housing

### Registration

## Reception

## Publicity

## Accounting

## Food and Beverage

## Notes

### Leisure Activities

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