



**PCMA professional  
DEVELOPMENTseries**

## **PLANNING CHECKLIST**

### 36-48 Months Out

1. Determine conference goals and objectives.
2. Identify possible dates for the meeting.
3. Prepare preliminary meeting outline to include blocks for program sessions, social events, exhibits, sleeping room requirements, and a brief description of each.
4. Begin site research on venues meeting the selection criteria.
5. Send meeting requirements to selected sites with requests for written proposals.
6. Set tentative meeting and exhibit dates after obtaining meeting dates and sites from other related organizations to avoid conflicts and potential tie-ins.
7. Review site proposals from responding suppliers; select potential sites.
8. Begin site negotiations with potential venues.
9. Conduct site visits as required.
10. Negotiate hotel rates and blocks; agree on and sign hotel contract(s).
11. Negotiate, agree on, and sign contracts with convention center or other facilities the meeting will use.
12. Negotiate fares with official airline if one is selected.
13. Add any deadlines and other requirements to timetable.

### 18-24 Months Out

1. Select and appoint local committees as required.
2. Establish promotional strategy, including two-year marketing plan and implementation schedule; add related deadlines and requirements.
3. Prepare first calendar notices and press releases for exhibit.
4. Prepare and mail letters to potential event sponsors requesting consideration in their budgets for the following year.
5. Evaluate current and potential markets, and identify target audience(s); review, update, and obtain mailing lists based on evaluation results (e.g., registrants, sponsors, advertisers, and exhibitors).
6. Prepare preliminary budget categories and set preliminary budget.
7. Review and evaluate past, current, and potential funding sources; specify areas of need for funding requests; and match program needs to fiscal needs and potential funding sources.
8. Prepare and mail funding request prospectus.
9. Review conference timeline for adjustments and update as required; review all tasks generated by internal and external requirements; identify needs for outside consultants, and specify requirements.

10. 10. Request proposals from potential consultants.
11. 11. Establish meeting theme and preliminary graphics (logo, program, etc.).

#### 19 Months Out

1. 1. Select meeting consulting firms or individuals, freight companies, and so on:
2. 2. Establish registration-fee structures and policies, being certain to include clear cancellation policies.
3. 3. Review, update, and prepare all policies and procedures governing the meeting, and distribute them to all staff, consultants, and committees.
4. 4. Identify areas of need for outside suppliers; outline specific requirements, and select decorator, security, airline, car rental, audiovisual, entertainment, destination management, transportation, and registration services.

#### A. Destination management companies-

- ~.(1) Obtain list of companies from local CVB
- ~.(2) Determine how long company has been in operation in the area.
- ~.(3) Check on company's financial history.
- ~.(4) Obtain references from other associations and firms.
- ~.(5) Determine whether staff is adequate to handle your needs.
- ~.(6) Obtain rates and price structure.
- ~.(7) Determine extent of insurance coverage.

#### ~.B. Transportation/shuttles-

- ~.(1) Determine types, configuration, and condition of equipment.
- ~.(2) Obtain clear understanding of price structure, e.g. minimum hours for which you will be charged, charges for extra mileage, method for calculating mileage, and so on.
- ~.(3) Determine what comes with the package-e.g., signs, coordinator.
- ~.5. Following up on the preceding, identify new sources for funding.
- ~.6. Review and establish guidelines for submission, review, and selection of papers.
- ~.7. Prepare master schedule of all known printing requirements, including specific items, anticipated quantity, coding system, deadlines, and potential printers.
- ~.8. Assemble exhibitor prospect lists.
- ~.9. Assign program issue area responsibilities.

#### 16 Months Out

1. 1. Arrange insurance coverage.
2. 2. Establish exhibit space rates.
3. 3. Produce tentative exhibit floor plan.

#### 14-15 Months Out

1. 1. Invite and confirm key speakers.
2. 2. Determine preliminary food and beverage requirements.
3. 3. Negotiate menus and prices.
4. 4. Select translation equipment if needed.
5. 5. Adjust exhibitor floor plan (becomes continuing task from this point on).
6. 6. Mail first meeting announcements and promotional materials to prospective attendees and exhibitors.

13 Months Out Obtain audiovisual needs from speakers.

#### 12 Months Out

1. 1. Review hotel contract deadline dates.
2. 2. Review, update, and confirm final meeting budget.
3. 3. Review and revise meeting accounting procedures and assign appropriate codes.
4. 4. Prepare and forward to meeting facility or facilities a tentative meeting schedule.
5. 5. Finalize materials and mail call for papers.
6. 6. Begin preparation of conference brochure, including copy, layout, and design.
7. 7. Update all speaker forms-releases, travel, housing, audiovisual.
8. 8. Establish categories of awards and selection criteria for them; update all related materials and mail.
9. 9. Prepare 12-month media schedule, identifying specific sources and completing media lists.

#### 10-12 Months Out

1. 1. Prepare list of available hotel function areas and specifications.
2. 2. Compile master list of suggested program topics and speakers.
3. 3. Refine master format for general sessions, workshops, luncheons, and ancillary (e.g., spouse/guest) events.
4. 4. Begin incorporating topics and speakers into meeting format.
5. 5. Compare hotel space and specifications and make tentative room assignments of meeting functions and activities.
6. 6. Begin confirming program speakers and topics as available; obtain biographical information and photographs as each is confirmed.
7. 7. Promote meeting through appropriate announcements.
8. 8. Make final selections of all remaining suppliers.
9. 9. Identify and begin preparation of organization's general sale items.
10. 10. Follow up on call for papers.
11. 11. Reevaluate target markets and mailing lists in preparation for brochure mailing.
12. 12. Continue promotion through organizational magazine and newsletters.
13. 13. Identify meeting functions and activities available for sponsorship and begin solicitation of specific sponsors.
14. 14. Prepare and mail exhibit prospectus and related materials.
15. 15. Establish procedures and controls for session and event admittance via tickets or badges; establish monitoring procedures.

#### 8-10 Months Out

1. 1. Continue follow-up on call for papers.
2. 2. Begin final selection of papers.
3. 3. Promote meeting in selected professional publications.
4. 4. Follow up on exhibitor mailing.
5. 5. Mail first meeting brochure.
6. 6. Begin determination of final award nominee lists.
7. 7. Establish and implement badge preparation process.
8. 8. Identify final reporting and analysis requirements; develop data collection system(s); and prepare data collection documents.
9. 9. Prepare expanded meeting brochure for second mailing.

10. 10. Prepare and mail second exhibitor solicitations.
11. 11. Review and update facility f4riction-space assignments and convey to facilities.
12. 12. Begin preparation of hotel function space diagrams for registration, general sessions, workshops, social functions, and so on.
13. 13. Begin assignment of exhibit space; mail confirmations of space, updates on meeting activities, function sponsorships, and meeting program advertising information.
14. 14. Begin processing of registration forms as received; prepare and mail preregistrant confirmation notices.
15. 15. Implement monthly registration reporting system.
16. 16. Identify and communicate on-site responsibility areas for committees and volunteers.
17. 17. Begin active solicitation of advertisers for program book.
18. 18. To the extent possible determine final meeting program and schedule for all events.
19. 19. Combine all relevant policies and specific procedures into manual for on-site use.

#### 4-6 Months Out

1. 1. Mail second meeting promotional brochure to potential attendees.
2. 2. Make final selection of award recipients.
3. 3. Identify materials for registration packets; select and order conference packet.
4. 4. Design and print all tickets for admission to meeting functions.
5. 5. Continue solicitation and follow-up of exhibitors, sponsors, and advertisers.
6. 6. Begin all food-and-beverage menu selections.
7. 7. Order necessary on-site office furniture and equipment.
8. 8. Order awards and related materials.
9. 9. Review registration returns based on market targeted; prepare and mail targeted registration invitation letters.
10. 10. Identify and assign staff on-site responsibilities.
11. 11. Select and order speaker gifts.

#### 2-4 Months Out

1. 1. Mail third promotional brochure to potential attendees if needed.
2. 2. Prepare special meeting issue of newsletter or other periodical.
3. 3. Request camera-ready ad copy for meeting program.
4. 4. Review sleeping-room pickup.
5. 5. Review and confirm session schedule, room assignments, and function-room diagrams with facilities and appropriate outside suppliers.
6. 6. Continue follow-up with exhibitors.
7. 7. Review meeting budget and adjust as required.
8. 8. Open bank account in host city if desired.
9. 9. Order special decorations for meeting functions.
10. 10. Make final food and beverage schedule.
11. 11. Make final translation arrangements.
12. 12. Review on-site staff needs.
13. 13. Determine security needs.
14. 14. Prepare and print conference evaluation forms.
15. 15. Prepare and print on-site registration forms; check on-site hardware and software.
16. 16. Begin preparation of written requirements to facilities and other suppliers.
17. 17. Implement weekly registration reporting system.

18. 18. Select printer for meeting program book.
19. 19. Confirm audiovisual and translation requirements.
20. 20. Review badge preparation process.
21. 21. Prepare sign list; order signs.

#### 1-2 Months Out

1. 1. Reconfirm all speakers and their requirements.
2. 2. Review exhibit hall floor plan.
3. 3. Print and mail invitations to special events.
4. 4. Confirm all food-and-beverage selections.
5. 5. Reconfirm all sponsored events.
6. 6. Print workbooks and handouts.
7. 7. Send final agenda to exhibitors and request list of personnel staffing booths.
8. 8. Continue follow-up with outside suppliers.
9. 9. Confirm and mail detailed requirements to facilities and on-site suppliers.
10. 10. Prepare up-to-date exhibit floor plan, exhibitor list, and schedule for program book.
11. 11. Arrange for all staff and VIP travel and housing.

#### 1 Month Out

1. 1. Print program book.
2. 2. Prepare and print list of pre-registrants.
3. 3. Finalize on-site accounting requirements like on-site payments, deposits, cash-out procedures, and so on.
4. 4. Order amenities.
5. 5. Confirm exhibit layout, and update exhibitor list.
6. 6. Schedule on-site media activities.
7. 7. Begin preparation of registration packets.

#### 2 Weeks Out

1. 1. Finalize food and beverage guarantees.
2. 2. Pack and send all conference materials for early shipment.
3. 3. Prepare badges for all nonregistered attendees like speakers, exhibitors, staff, complimentary registrations, and so on.
4. 4. Communicate all last-minute changes and new requirements to facilities affected suppliers.

#### 1 Week Out

1. 1. Set up all on-site individual preconference review meetings with suppliers.
2. 2. Finalize time and agenda for facilities and suppliers.
3. 3. Provide required early guarantees to facilities.
4. 4. Complete proofing of badges and preparation of packets.
5. 5. Follow-up on on-site media activities.
6. 6. Establish on-site staff meeting schedule and required attendance list.
7. 7. Verify VIP arrivals, and schedule airport pickups.

#### On Site

1. 1. Receive and inventory all shipments, equipment, and supplies.
2. 2. Review all VIP arrangements.

3. 3. Set up conference offices.
4. 4. Conduct individual review meetings with suppliers and facility departments.
5. 5. Conduct personnel instructional briefings for registration staff, data collectors, volunteers, volunteers, and others.
6. 6. Conduct pre-conference and daily staff meetings.
7. 7. Review each day's requirements, and highlight following day's requirements.
8. 8. Review responsibilities, procedures, and overlap areas like registration, food guarantees, speakers, VIPs, media room setups, data collection, spouse/guest/children's events, exhibits, sponsors, and so on.
9. 9. Reemphasize communication lines and authority and responsibility levels to meeting staff, suppliers, meeting facility staff, and volunteers.
10. 10. Arrange daily invoice review with meeting facilities.
11. 11. Consult with meeting support personnel as required for issuance of gratuities.
12. 12. Confirm and monitor pickup of all rental equipment and supplies.
13. 13. Arrange for return shipment of all materials.
14. 14. Conduct post-conference wrap-up meeting with meeting facility departments and suppliers as needed.

#### Immediately after Meeting

1. 1. Pack and inventory all materials
2. 2. Do financial reconciliation.
3. 3. Perform post-budget performance review.

#### 1-2 Months After

1. 1. Prepare list for thank-you letters; prepare and mail letters.
2. 2. Prepare and mail final attendance list.
3. 3. Collect and organize data for final meeting reports.
4. 4. Obtain evaluations from staff, volunteers, consultants.
5. 5. Prepare summary reports of all evaluation forms.
6. 6. Review each invoice received, break each down into appropriate meeting categories, and schedule payment.
7. 7. Prepare preliminary financial reports.

#### 2-3 Months After

1. 1. Prepare final financial reports, breaking them into appropriate subcategories for final meeting report and reports to management, sponsors, and funding sources.
2. 2. Prepare and distribute final meeting report and distribute.