

# PLANNING CHECKLIST

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## CHRONOLOGICAL PLANNING CHECKLIST

(Based on 500+ delegates)

### Preliminary (allow 18 – 24 months)

- + Set objectives of meeting, convention or exhibition
- + List topics to be covered
- + Choose an appropriate theme
- + Appoint a Conference Coordinator 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)

- + 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)

- + Prepare list of sponsorship prospects
- + Prepare a sponsorship proposal and source financial support

### Event Program (allow 12 – 18 months)

- + Develop and implement promotional strategy
- + Prepare a printed program schedule
- + Select suitable speakers and presenters
- + Coordinate audio-visual, entertainment, functions, workshops etc
- + Organise programs for partners, associates and families
- + Organise options for pre/post touring

### Administration (allow 12 – 18 months)

- + Establish a computerised mailing list and registration database
- + Design and distribute a registration brochure
- + Set up sub-committees and recruit volunteers to coordinate event specifics
- + Record all statistics e.g. attendance, income etc.
- + Ensure all on-site staff are qualified and competent
- + Coordinate registration and management of facilities
- + Engage contractors e.g. exhibition management, PR/Marketing agencies

### Venue (allow 12 – 18 months)

- + 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 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)

- + Listings in upcoming events schedules, promote via related 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)

- + Develop touring program including itineraries and events
- + Investigate professional assistance in handling touring program
- + Coordinate touring transport, guides and accommodation

### Event Supplies and Accessories (allow 3 months)

- + Acquire and distribute all materials necessary for the conference e.g. stationery, name tags, satchels etc.
- + Coordinate displays, stands, and technological requirements for the event
- + Engage and brief temporary staff for event coordination

### Final Confirmations (allow 1 – 3 months)

- + 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

- + Prepare final costs and budget report
- + Write a post-event evaluation for client
- + Send acknowledgements and thanks to speakers, suppliers, venues and sponsors
- + Recover and plan for your next event in Canberra