checklist

Business Meetings Checklist

Business Meetings Houston offers the following checklist to help meeting planners keep on track.

Three to nine months prior to event:	One day before event:
☐ Determine purpose of the meeting	☐ Verify that all arrangements have been made
☐ Identify target audience	☐ Assign staff responsibilities
☐ Anticipate outcomes	☐ Have press kits and giveaways ready for distribution
☐ Interview and select a meeting planner	☐ Verify transportation needs of VIP guests
☐ Finalize date	
☐ Develop timeline	
☐ Determine roles and responsibilities	Day of the event:
☐ Determine venue	\square Set table numbers and place cards
☐ Schedule speakers	\square Post signage at meeting facility
☐ Determine guest count	\square Have name tags and attendee lists at registration
☐ Choose a theme	☐ Distribute evaluations
☐ Determine transportation needs	
☐ Hire a decorator and florist	After the event:
☐ Determine entertainment and music	
	Write and mail thank you letters
	☐ Settle any bills
Two to three months prior to event:	☐ Send flowers or gifts to special contributors
\square Finalize the guest list	Write and send follow-up press releases
\square Plan menus for meal and breaks	\square Evaluate the overall success of the event
☐ Design and print invitations and other stationary	
☐ Compile handouts and attendee collateral	
☐ Design and print press kits	Notes:
☐ Determine Web presence	
(consider possible "enduring elements")	
☐ Review budget	
☐ Select and order corporate gifts	
☐ Coordinate travel and transportation needs for VIPs	
and/or speakers	
☐ Design and order signage	
☐ Order awards and handouts	
☐ Review contracts with appropriate personnel	
One month prior to event:	
☐ Design meeting room layout	
☐ Determine audiovisual and staging needs	
☐ Make parking arrangements	
☐ Contact press writers that cover event similar to yours	
☐ Create contingency and security plan	
□ Develop feedback/ survey forms	
☐ Provide guarantees for food and beverage functions	
Order special dietary requests	
One week prior to event:	
□ Verify accurate guest count □ Alphabetize guest list and modia list	
☐ Alphabetize guest list and media list	
☐ Prepare seating assignments	
☐ Solidify clean-up staff	
☐ Budget petty cash to pay vendors	