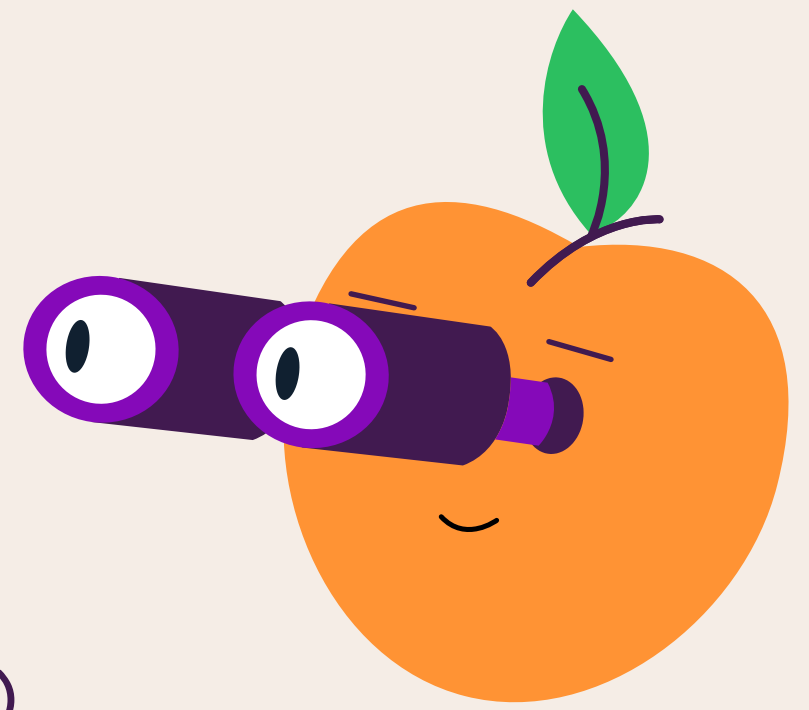# Conference Planning Checklist

Pre-Planning

- ◯ **Assemble a team**
  - ◯ Identify roles and responsibilities
- ◯ **Set objectives**
  - ◯ Identify KPIs (# of attendees, # of contacts, revenue, etc)
- ◯ **Identify your target audience**
- ◯ **Come up with a theme and format**
- ◯ **Develop a budget**

9-12 Months Before the Conference

- ◯ **Book a venue**
  - ◯ Inquire about any additional fees and regulations
  - ◯ Make sure the venue is accessible
  - ◯ Arrange for accommodation for out-of-town attendees
- ◯ **Confirm conference date(s)**
- ◯ **Create a master plan**
  - ◯ Starting with Day 1 of the conference, work backwards and list each task to be done
  - ◯ Create deadlines
  - ◯ Identify the team member responsible for each task
- ◯ **Choose your technology - we recommend an all-in-one event planning software or a combo of:**
  - ◯ Virtual conference platform (only needed for virtual/hybrid events)
  - ◯ A website builder
  - ◯ Event registration software
  - ◯ A customer relationship management (CRM) system - use for attendee communication and management
  - ◯ A project management tool (deadlines, speakers, vendors, budget, etc)

6-9 Months Before the Conference

- ◯ **Find speakers**

- ◯ **Find sponsors and/or exhibitors**

- ◯ **Develop branding**
  - ◯ Conference name
  - ◯ Slogan
  - ◯ Logo
  - ◯ Color palette
  - ◯ Develop messaging
  - ◯ Imgers (photographs and/or graphics

3-6 Months Before the Conference

- ◯ **Order branded merchandise and event materials**
  - ◯ Swag bag items
  - ◯ Ask sponsors if they'd like to contribute to swag bags
  - ◯ Volunteer t-shirts
  - ◯ Lanyards and name badges
  - ◯ Event signage

- ◯ **Find suppliers**
  - ◯ Catering
  - ◯ Furniture
  - ◯ A/V and Wi-Fi

- ◯ **Recruit volunteers**

- ◯ **Start promoting**
  - ◯ Develop and produce invitations, posters, tickets, etc. (utilize digital and print)
  - ◯ Set up a website with a registration page
  - ◯ Release early-bird tickets
  - ◯ Send out a press release
  - ◯ Send out promotional emails
  - ◯ Promote on social media (LinkedIn, Instagram, Facebook, TikTok, X, etc.)
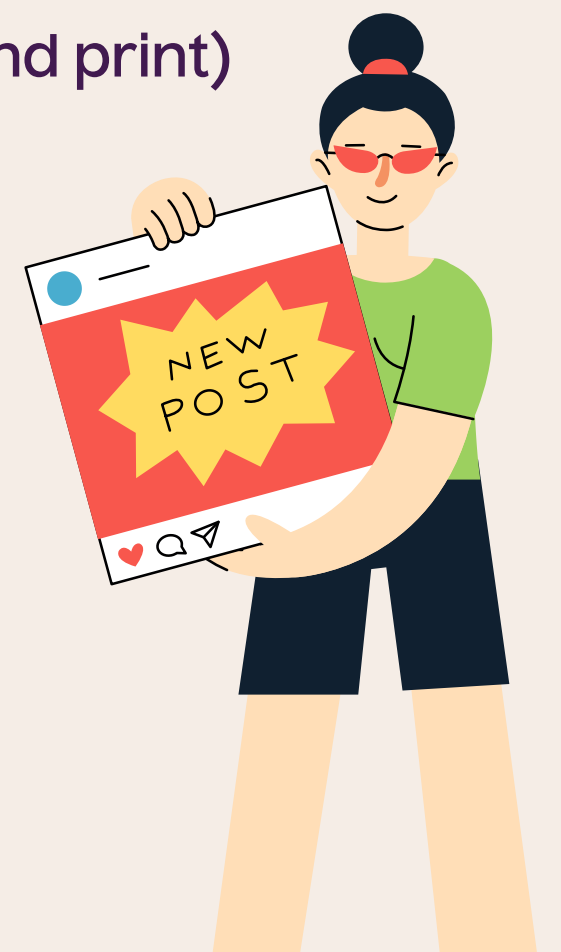
1 Month Before the Conference

- ◯ **Finalize conference schedule**
  - ◯ Produce conference program for attendees
  - ◯ Create a master schedule for the speakers, your staff, venue staff, suppliers and volunteers
- ◯ **Create customized documents for staff with key tasks and responsibilities**

1 Week Before the Conference

- ◯ **Send out reminders to attendees**
  - ◯ Publish an FAQ on your website
  - ◯ Offer your contact information should they have any questions or concerns
- ◯ **Check that team, speakers and volunteers have everything they need**

1 Day Before the Conference

- ◯ **Last team check-in**
  - ◯ Address final concerns
  - ◯ Communicate last minute changes
- ◯ **Check that team, speakers and volunteers have everything they need**
  - ◯ Event space is set up
  - ◯ Name badges are ready for pick up at check-in
  - ◯ Test all technology - A/V, live streaming, etc.
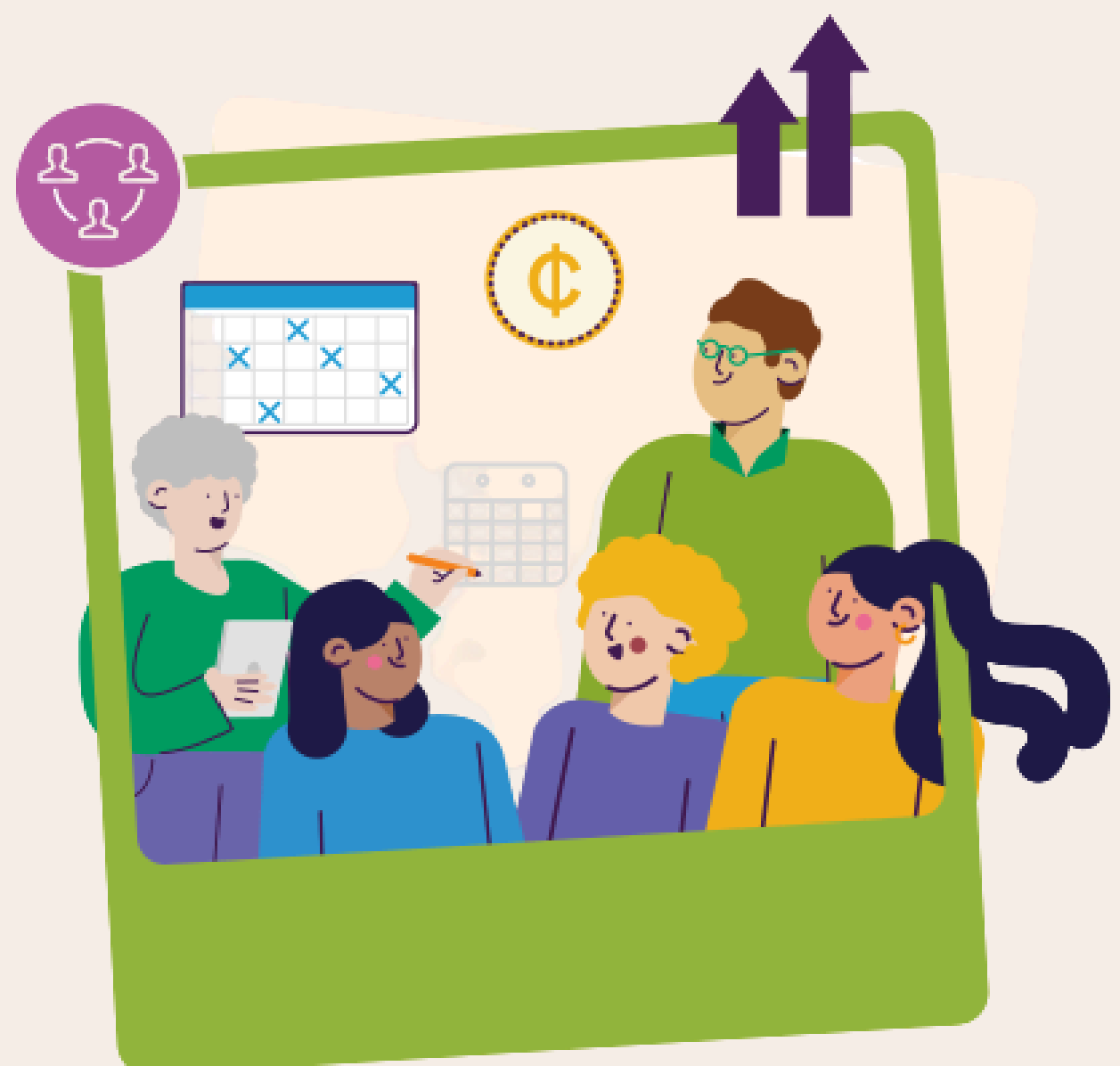
During the Conference

- ◯ Assist sponsors, speakers and other teams as needed

- ◯ Ensure that live-streaming technology is working

- ◯ Engage with virtual attendees (if the conference is virtual or hybrid)

- ◯ Monitor engagement on social media

- ◯ Send out daily recaps to attendee via email (multi-day event)

After the Conference

- ◯ Follow up with everyone involved to thank them for attending or helping:
  - ◯ Attendees
  - ◯ Sponsors
  - ◯ Speakers
  - ◯ Volunteers
  - ◯ Suppliers

- ◯ Send out a post-conference feedback survey to all attendees

- ◯ Determine whether or not you met your goals. Analyze:
  - ◯ Attendance numbers
  - ◯ Revenue
  - ◯ Engagement rate
  - ◯ Other metrics

- ◯ Host a post-mortem meeting with your team. Discuss what went well and what you can improve on next conference

- ◯ Keep in touch with all attendees to remind them about any other upcoming events, services, membership, etc.