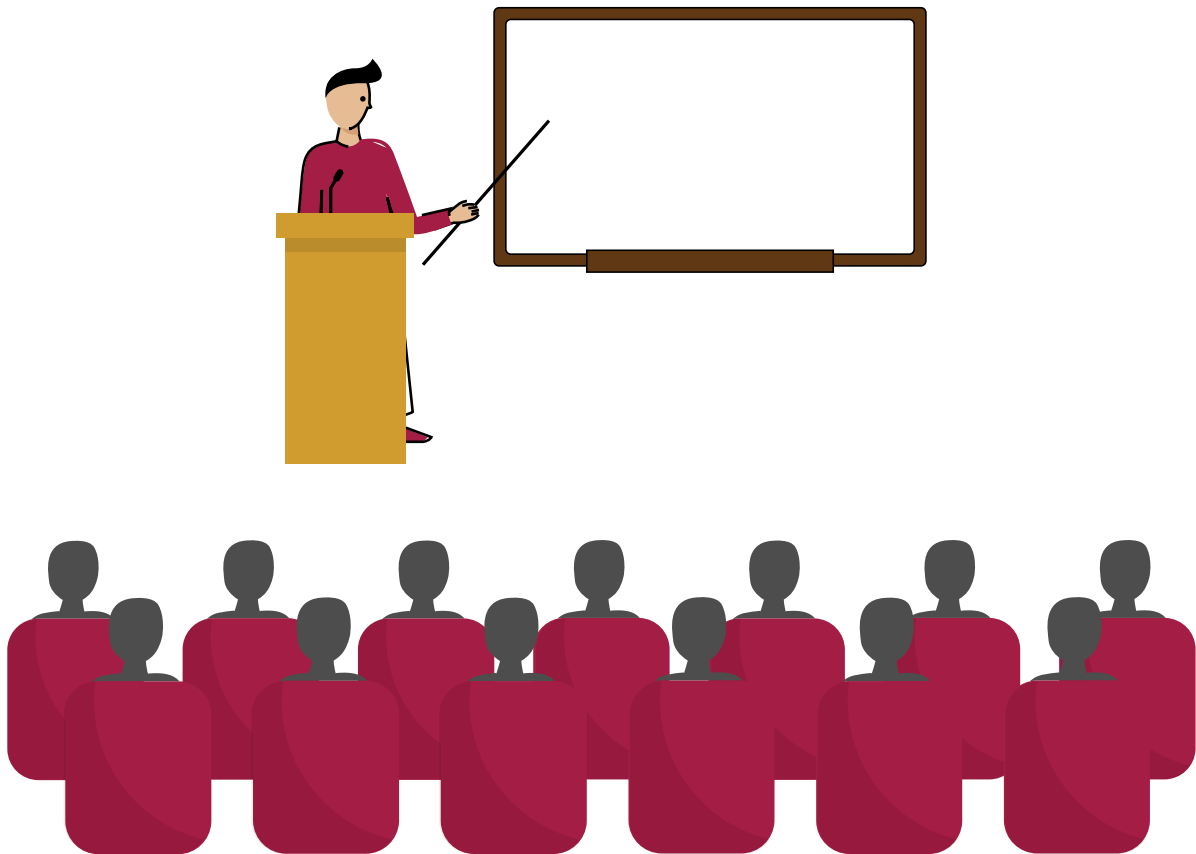


# Conference Planning Checklist



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Every successful conference starts with a well-thought out plan. That's why we've put together this checklist — it includes everything you'll need to consider when planning your own conference.

The tasks in this checklist are broken down by when they should be completed. Use our suggested timeline as a guide, but ultimately, your own schedule will depend on the size and format of your conference, as well as the size of your team.

## Before You Start Planning

- ☐ **Assemble a team**
  - ☐ Identify roles & 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 every task that needs to be done
  - ☐ Create deadlines
  - ☐ Identify the team member responsible for each task

- ☐ **Choose your technology — all-in-one event planning software or a combination of:**
  - ☐ Virtual conference platform (only for virtual or hybrid events)
  - ☐ A website builder
  - ☐ Event registration software
  - ☐ A customer relationship management (CRM) system (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
  - ☐ Color palette
  - ☐ Slogan
  - ☐ Develop messaging
  - ☐ Logo
  - ☐ Imagery (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 include any of their promotional items in the 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. (both 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

## 1 Month Before the Conference

- ☐ **Finalize conference schedule**
  - ☐ Produce conference program for the 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

- ☐ **Ensure everything is set up and working properly**
  - ☐ Event space is set up
  - ☐ Name badges are ready for pick up at check-in
  - ☐ A/V, live-streaming, all other technology has been tested

## 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 attendees 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 survey to all attendees to ask them for feedback.
- ☐ Determine whether or not you met your goals. Analyze things like:
  - ☐ Attendance numbers
  - ☐ Revenue
  - ☐ Engagement rate
  - ☐ Other metrics
- ☐ Host a post-mortem meeting with your team to discuss what went well and what you would do better next time.
- ☐ Keep in touch with all attendees to remind them about any other upcoming events, services, membership, etc.