# 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:

- $\Box$  Determine purpose of the meeting
- $\Box$  Identify target audience
- $\Box$  Anticipate outcomes
- $\Box$  Interview and select a meeting planner
- 🗆 Finalize date
- Develop timeline
- Determine roles and responsibilities
- □ Determine venue
- $\Box$  Schedule speakers
- □ Determine guest count
- $\Box$  Choose a theme
- □ Determine transportation needs
- $\Box$  Hire a decorator and florist
- □ Determine entertainment and music

### Two to three months prior to event:

- $\Box$  Finalize the guest list
- $\Box$  Plan menus for meal and breaks
- $\Box$  Design and print invitations and other stationary
- □ Compile handouts and attendee collateral
- Design and print press kits
- □ Determine Web presence
- (consider possible "enduring elements")
- $\Box$  Review budget
- $\Box$  Select and order corporate gifts
- $\hfill\square$  Coordinate travel and transportation needs for VIPs and/or speakers
- $\hfill\square$  Design and order signage
- $\Box$  Order awards and handouts
- □ Review contracts with appropriate personnel

#### One month prior to event:

- $\Box$  Design meeting room layout
- $\Box$  Determine audiovisual and staging needs
- □ Make parking arrangements
- $\Box$  Contact press writers that cover event similar to yours
- $\Box$  Create contingency and security plan
- □ Develop feedback/ survey forms
- $\Box$  Provide guarantees for food and beverage functions
- $\Box$  Order special dietary requests
- One week prior to event:
- $\Box$  Verify accurate guest count
- $\Box$  Alphabetize guest list and media list
- Prepare seating assignments
- $\Box$  Solidify clean-up staff
- $\Box$  Budget petty cash to pay vendors

# One day before event:

- □ Verify that all arrangements have been made
- $\Box$  Assign staff responsibilities
- $\Box$  Have press kits and giveaways ready for distribution
- □ Verify transportation needs of VIP guests

#### Day of the event:

- $\Box$  Set table numbers and place cards
- □ Post signage at meeting facility
- $\Box$  Have name tags and attendee lists at registration
- □ Distribute evaluations

#### After the event:

- □ Write and mail thank you letters
- $\Box$  Settle any bills
- $\Box$  Send flowers or gifts to special contributors
- $\Box$  Write and send follow-up press releases
- $\Box$  Evaluate the overall success of the event
- Notes:\_\_\_