



PLANNING TIMELINE

36-48 Months Out

1. Determine conference goals and objectives.
2. Identify possible dates for the meeting.
3. Prepare preliminary meeting outline to include blocks for program sessions, social events, exhibits, sleeping room requirements, and a brief description of each.
4. Begin site research on venues meeting the selection criteria.
5. Send meeting requirements to selected sites with requests for written proposals.
6. Set tentative meeting and exhibit dates after obtaining meeting dates and sites from other related organizations to avoid conflicts and potential tie -ins.
7. Review site proposals from responding suppliers; select potential sites.
8. Begin site negotiations with potential venues.
9. Conduct site visits as required.
10. Negotiate hotel rates and blocks; agree on and sign hotel contract(s).
11. Negotiate, agree on, and sign contracts with convention center or other facilities the meeting will use.
12. Negotiate fares with official airline if one is selected.
13. Add any deadlines and other requirements to timetable.

18-24 Months Out

1. Select and appoint local committees as required.
2. Establish promotional strategy, including two-year marketing plan and implementation schedule; add related deadlines and requirements.
3. Prepare first calendar notices and press releases for exhibit.
4. Prepare and mail letters to potential event sponsors requesting consideration in their budgets for the following year.
5. Evaluate current and potential markets, and identify target audience(s); review, update, and obtain mailing lists based on evaluation results (e.g., registrants, sponsors, advertisers, and exhibitors).
6. Prepare preliminary budget categories and set preliminary budget.
7. Review and evaluate past, current, and potential funding sources; specify areas of need for funding requests; and match program needs to fiscal needs and potential funding sources.
8. Prepare and mail funding request prospectus.
9. Review conference timeline for adjustments and update as required; review all tasks generated by internal and external requirements; identify needs for outside consultants, and specify requirements.
10. Request proposals from potential consultants.
11. Establish meeting theme and preliminary graphics (logo, program, etc.).



19 Months Out

1. Select meeting consulting firms or individuals, freight companies, and so on:
2. Establish registration-fee structures and policies, being certain to include clear cancellation policies.
3. Review, update, and prepare all policies and procedures governing the meeting, and distribute them to all staff, consultants, and committees.
4. Identify areas of need for outside suppliers; outline specific requirements, and select decorator, security, airline, car rental, audiovisual, entertainment, destination management, transportation, and registration services.