

# Timeline for Planning a Meeting

## **Before booking:**

- Determine the objective of the meeting and develop the program and budget
- Determine the space and rooms needed – do a site visit
- Determine dates -check calendar of local events to avoid conflicting or inappropriate dates
- Review and negotiate contract

## **At time of booking:**

- Sign contract
- Be aware of deposits and deadlines
- Set-up master account for your meeting charges with the hotel (authorize who can sign charges)
- Inform staff of the venue
- Notify attendees to register for the meeting with accommodation information, ask for accessibilities needs
- Make travel arrangements for staff and speakers – if applicable

## **At least 6 weeks before:**

- Finalize event program/agenda for the meeting
- Confirm menus, room setups and supplies with your sales manager (after the sales manager will supply you with a Banquet Event Order (BEO))
- Order signs
- Print materials
- Request meal selections from attendees, ask them to include any dietary specifications– if applicable
- Send out agendas to all attendees
- Submit rooming list to hotel- if applicable
- Order gifts and amenities – if applicable

## **At least 3 weeks before:**

- Review BEOs and have sales manager make any corrections necessary before signing
- Review rooming list – if applicable
- Check with speakers regarding travel and presentations
- Send a reminder to attendees that have not yet replied with their meal selections– if applicable
- Confirm arrangements for amenities- if applicable

## **At least 1 week before:**

- Ship materials to arrive 24 hours before your arrival, and confirm arrival before leaving for the event and make arrangements for shipping materials back to your office after the meeting – if applicable
- Confirm all your food and beverage counts
- Make a complete master set of all contracts, BEOs, rooming list and handouts to bring with you

## **Upon arrival:**

- Review details (notes and BEOs) and walk through your meeting space with your sales/events manager
- Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition- if applicable
- Check the hotel function board and front desk for posted times and locations of your functions

## **Meeting Days:**

- Check and prepare function space and AV equipment one hour in advance
- Notify your event manager immediately of any changes in your plans or requirements
- Sign banquet checks each day and keep an ongoing record of your on-site expenses
- Make notes of event staff that you work with on-site

## **Concluding the meeting:**

- Meet with your event manager to review your sessions, charges, and receipts
- Share with your event manager the names of staff members who have provided extraordinary service
- Tip event staff – if applicable