# CONFERENCE A green sign with white text  Description automatically generated

# PLANNING

# CHECKLIST

## Pre-Planning

### 18 to 24 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Identify objectives * Theme
* Title
* Target audience
* Topics and presentations
* Goals
 |  |
| Determine dates |  |
| Establish conference committee |  |
| Identify conference budget |  |
| Create a list of potential sponsors* Begin reaching out to possible sponsors
 |  |
| Determine booth offers and rates |  |
| Reach out to potential speakers* Determine payment rates
* Select official speakers
 |  |

### 12 to 18 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Select conference venue |  |
| Set up registration* Determine fees and conditions
* Choose a management platform
 |  |
| Send early conference communication* Email
* Social media
* Print
 |  |
| Create and send an invitation letter |  |
| Announce speakers, panels, and presentation topics |  |
| Create a conference marketing plan* Create a paid promotional plan
 |  |
| Identify the proper communication channels |  |
| Design and print physical materials* Brochures
* Pamphlets
* Advertisements
 |  |
| **If applicable:** Arrange participant and speaker travel plans |  |

### 9 to 12 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Open and collect registration |  |
| Create and send reminder emails* Early admission emails
* Presentation proposals
* Speaker confirmations
 |  |
| Register the conference with local, national, and industry-specific calendars or social pages |  |
| Determine the conference’s program |  |

### 6 to 9 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Respond to all inquiries and requests continuously |  |
| Update speakers and organizers about conference information and programming |  |
| Advertise conference on selected communication channels |  |
| Manage and organize registrations |  |
| Update and finalize supplier and vendor contracts |  |

### 3 to 6 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Respond to all inquiries and requests continuously |  |
| Finalize presentation proposals |  |
| Finalize panels and panel topics |  |
| Create detailed conference program |  |
| Design and create name badges for speakers and organizers |  |
| **If applicable:** Finalize speaker and attendant accommodations |  |

### 1 to 3 months before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Send out final conference promotional materials* Print
* Web
* Social media
* Paid
 |  |
| Finalize registration list |  |
| Purchase supplies for attendees* Badges
* Maps
* Programs
 |  |
| Confirm all registrations |  |
| Pay outstanding fees |  |
| Announce the final program to registered attendees |  |
| **If applicable:** Confirm accommodations and sent detail information to speakers and attendees |  |
| **If applicable:** Finalize and announce the conference’s mobile app |  |

### 1 month before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Prepare conference kits for attendees |  |
| Print badges |  |
| Set up a conference rehearsal with event organizers |  |
| Create post-conference surveys |  |

### 1 week before the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Organize last-minute rehearsals if needed |  |
| Create conference script |  |
| Finalize registration list and badges |  |
| Print speeches and other organizational materials |  |
| Move all conference items to the venue* Speaker gifts
* Technology
* Awards
 |  |

## Conference Duration

### During the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Set up registration table |  |
| Check in attendees* Hand out name badges and participant packets
 |  |
| Verify presentation rooms |  |
| Verify media and technology availability |  |
| Manage conference logistics* Attendees
* Speakers
* Organizers
* Scheduling
* Questions or concerns
 |  |

## Post-Conference

### After the conference

|  |  |
| --- | --- |
| **Items** | **Completed** |
| Pay any outstanding fees |  |
| Update conference budget |  |
| Analyze report data* Final registration
 |  |
| Create post-conference marketing plan |  |
| Send thank you and appreciation messages to participants* Suppliers
* Vendors
* Speakers
* Staff
* Venue
 |  |
| Distribute post-conference surveys |  |
| Analyze results from surveys and compile a conference report |  |

|  |
| --- |
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