



# CONFERENCE PLANNING CHECKLIST





# The Ultimate CONFERENCE PLANNING Checklist

## FIRST THINGS FIRST

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Whether you are planning your first conference or your fiftieth... planning is essential to the success of your event!

As Winston Churchill famously said,

*"Those who fail to plan, plan to fail."*

So here is a helpful checklist to help you on your journey of hosting a successful conference!

## WHEN TO START PLANNING

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Depending on the type of conference you are hosting, if it is a morning conference, a one day event, or even a week long conference, this will determine when you need to start planning.

If you have held the conference previously, this may make planning easier and smoother. For instance, if you have used suppliers at previous events which have been successful, use those same suppliers again! Make life as easy as possible for yourself by knowing what works for you and your team.



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## STARTING OUT

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- Define the purpose and objectives of the conference.
- Consider what you would like your delegates to gain from attending.
- Who will be the key members of the conference planning committee?
- Clarify who the decision maker(s) is.
- Who will be there to help onsite ahead of the conference and on the day?
- Money Money Money! What is your budget? Do you require sponsors?
- Note key ideas and a preliminary plan of things you would like to include in your conference.
- When do you want it to take place? Are you flexible on dates dependent on availability of venues?
- Where do you want it to take place? Consider aspects such as public transport, parking and accessibility.
- Estimate a number of delegates that you would like to attend. This helps planning with short-listing venues for capacity and catering.
- How long will your event be? A morning, full day, 3 days, or even a full week long conference?
- Do you need to attract delegates and companies to your conference by PR?  
Create a Marketing Plan.
- Does the event need insured? What insurance is covered through the venue?



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## FINDING YOUR CONFERENCE VENUE

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Finding a venue to suit all your requirements may mean you have a difficult search ahead of you. Be open minded, as your potential venues may be able to provide you with ideas and solutions you may not have considered. They are the experts and host hundreds of events every year. Venues will do their best to provide you with a service to make your conference run smoothly!

- Preferred Conference dates. Consider optional dates for venue availability.
- How many function rooms do you require? Consider meeting space, networking areas and dining facilities.
- What seating formats are required? Theatre style, Cabaret, Classroom etc. These can affect the capacities of the function rooms.
- What times are each of the rooms required? If a venue does not have availability for a certain time, is another option available depending on flexibility of the conference?
- What is the full space available in the venue for breaks for lunch and dinner, or even a Gala Dinner Reception at the end of a conference?
- How many bedrooms are available in the hotel for the preferred dates. Important to consider if many delegates will be travelling to your venue.
- Consider the different bedroom types. How many Suites and Executive bedrooms are available for VIP delegates?
- If you are hosting an Exhibition alongside your conference, what are the appropriate shell scheme sizes for each exhibitor?
- Budget. Keep this in mind when comparing venues and facilities.
- Consider the venue's Terms & Conditions required when booking, in terms of payments, cancellation policies and if booking a block number of rooms.



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## CHOOSING YOUR VENUE *from your options...*

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- Consider which facilities will best suit your conference.
- Consider which venue will live up to the expectations of your conference delegates (especially for those travelling).
- Determine which venue would be best for you and your team to work with.
- Don't forget about your budget! Does your venue meet this?

## SO NOW WHAT NEEDS DONE?

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- Book your chosen venue.
- Book your suppliers for AV equipment & staging.
- Consider the print materials you may need to schedule booking eg Delegate Handbooks and Guides.
- Invite your Speakers.
- Prepare invitations to delegates who may have previously attended your events or conferences.
- Promote your conference for new audiences.

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## 3 MONTHS PRIOR

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- Confirm conference details with the venue (number of meeting rooms, bedrooms, delegates, catering)
- Order directional signage.
- Order printed materials (handbooks etc)
- Prepare contingency plans (for instance if a speaker falls sick)
- Update your budget.
- Invite delegates.
- Confirm speakers and equipment required for each one.

## 1 MONTH PRIOR

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- Confirm catering and menus.
- Follow up with the speakers. Check how the presentation is coming along, confirm presentation due dates for handouts etc.
- Confirm the speakers requirements as agreed with 3 months prior, incase of any changes.
- Confirm the dates that the speakers will be arriving and staying for reservation confirmations.
- Produce a Press Release to increase media coverage on your conference.
- Ensure printed materials are produced/in process.
- Send rooming list to the hotel, noting any VIPs for them to be allocated the Suites or Executive Rooms with any other special requests.
- Schedule a meeting with committee and event staff.



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## 1 WEEK PRIOR

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- Package materials to be sent to the venue 48 hours prior to your arrival. Ensure the venue knows to expect the materials to be stored securely.
- Prepare a master copy of presentations.
- Confirm event details with your photographer. Include the type of shots you would like, and if there are any VIP's to ensure they are in your "shot list".
- Confirm everything is in check with your suppliers and exhibitors.
- Send out Press Release.
- Prepare name badges or lanyards for delegates.
- Check all equipment is ready, including power cords for laptops/printers/AV equipment that you are bringing yourself.
- Hold an events staff briefing with a handbook or kit for important information.
- Confirm with the venue who has the authority to sign bills and confirm any extra charges.

## DAY BEFORE CONFERENCE

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- Ensure materials have arrived at the venue.
- Pack a 'supplies kit' for extra materials such as paper, tape, scissors, stapler, pens, pencils etc!
- Hold a pre-event meeting with key members.



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## DAY OF THE CONFERENCE

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- Arrive early to check location is set up correctly. Check equipment such as microphones, projectors and computers.
- Check registration area is set up, with name badges and handbooks.
- Ensure staff and greeters know their role and are ready to go ahead of the conference.
- Check in with the speakers ensuring they are ready to go!
- Double check all the directional signage is in place to help delegates from getting lost around the venue.
- Do some live tweeting and social media posts about your conference kicking off, and throughout each of the speakers!
- Create a #hashtag for your event. Ensure delegates know the # so that your conference is being talked about!
- Relax and let your conference commence! Remember your venue is there to help you if you need.





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## AFTER THE CONFERENCE

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- Host a wrap-up meeting with the key members, noting what worked well and what could be improved.
- Forward on feedback to your venue contact.
- Prepare a summary and evaluation of the conference.
- Review invoices and send payments as required.
- Contact suppliers and exhibitors that attended, creating a partnership for future conferences and events.
- Send thank you cards to speakers, key members, volunteers, sponsors and venue.
- Look forward to your next successful conference!

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