Conference Planning Checklist

Pre-Planning
18 to 24 months before the conference

- 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

- 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 paid promotional plan
- Identify the proper communication channels
- If applicable: Arrange participant and speaker travel plans
- Design and print physical materials
9 to 12 months before the conference

- 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

- 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

- 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

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

1 week before the conference
- 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
- 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*

- 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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