# CONFERENCE [A green sign with white text Description automatically generated](https://www.smartsheet.com/try-it?trp=11825&utm_source=integrated-content&utm_campaign=/content/conference-planning-templates&utm_medium=Conference+Planning+Checklist+doc+11825&lpa=Conference+Planning+Checklist+doc+11825)

# 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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