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

- ☐ Brochures
- ☐ Pamphlets
- ☐ Advertisements

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

DISCLAIMER