

Planning A Meeting - Getting Started

Typically if your job title is “Meeting Planner”, “Event Coordinator” “Program Director” you plan meetings, either internal or external, on a regular basis. Some meeting planners who work for large companies and associations are *Certified Meeting Professionals* and have teams of people they work with for planning their meetings with each member of the team responsible for a different aspect of the planning. If however you are planning a meeting for the first time and are unsure how to get started, there are some key areas you should focus on. Set-up a worksheet and start gathering information and answering the following questions:

1. The name of the company, association or department that the meeting is being planned for.
2. What kind of event is it? i.e. national sales meeting, client conference.
3. What is the objective of the meeting?
4. Will you have a theme for the meeting?
5. What will the event consist of i.e. opening/closing keynote speaker, luncheon entertainment, breakout sessions, workshops, cocktail party. Each segment should be separately organized and then incorporated into the overall event.
6. The number of days the event will take place over. Come up with a timeline.
7. Date of the event. Come up with a preferred date and have second and third choices.
8. Commencement date in the AM or PM and the date and time that the meeting will be over.
9. Size of the event. How many attendees do you expect?
10. Check the calendar to make sure that your date is free of conflict with religious holidays, other industry events etc
11. Determine the budget that you are working with.
12. Put together a plan for publicity, promotion and advertising.
13. Location – where will the meeting be held? Will you have the meeting at a convention center, hotel, resort, historic property?

14. If the meeting is going to be off-site will it be local, in another town or city or in another State?

15. Site visits may be in order to help you determine the best location for your meeting. Once you have chosen the meeting site, determine how many guest rooms and how many meeting rooms will be required.

16. Start planning for meals and food/beverages that will be available on-site.

17. Audio visual and sound equipment. What will be required? Will you use the services provided by the facility where you are having your meeting or work with outside vendors?

18. Entertainment – will entertainment will bought in and be part of your meeting or be provided off-site?

19. Transportation - people/freight.

20. Insurance

21. Estimated overall expense.

If there is a website with a page set-up where you are advertising your meeting or event, it is really helpful to keep updating the information there to keep potential attendees or members abreast of developments as you finalize respective details i.e. date, location, facility, about the surrounding area, the meeting agenda. Carefully thinking everything through and attention to detail throughout the planning process will help to ensure a highly successful and memorable event.

Look on our company website under the “*For Meeting Planners*” link for a Master Planning Worksheet and support documents. This comprehensive guide provides the most up-to-date information you need to plan a corporate meeting right from your desktop.

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