

Timeline Guideline

SIX TO THREE MONTHS OUT

- Identify and select planning committee members
- Planning committee begins meeting, selecting the program, venue, and date
- Select and invite speakers
- Begin contacting potential sponsors, and exhibitors if applicable
- Contact and visit possible sites to hold the forum
- Develop design for forum marketing materials (logo, web banner, document headers, brochure, webpage, etc.)
- Develop theme and messages for speaker/sponsor/exhibitor outreach
- Conduct outreach to speakers/sponsors/exhibitors
- Send letters of agreement to speakers and sponsors and exhibitors immediately once they agree to participate

FOUR TO TWO MONTHS OUT

- Shape the list of invites. Remember that not everyone you invite will come so build some redundancy into your list.
- Have planning committee members identify list of colleagues and contacts they will personally invite
- Send save-the-date postcards or e-mail messages to invitees
- Submit announcements about the forum to local events calendars, trade publications, etc.

- Develop plan for attracting media coverage for the forum
- Send invitation letters or e-mails with details about the forum, including the agenda and any special activities being offered by the forum host. Be sure to specify the RSVP date or any early registration deadlines.

ONE MONTH OUT

- Send speakers any instructions for their presentation to ensure minimal overlap and adequate topic coverage, along with logistics details. Ask for any audio-visual requirements.
- Confirm exhibitors and send them information on exhibit set-up and break-down

THREE WEEKS OUT

- Host a conference call to coordinate presentations and panels
- Send registration reminder to participants
- Follow up with office of any local officials participating in the forum
- Compile list of local media contacts

TWO WEEKS OUT

- Send a media advisory to local reporters
- Continue to urge planning committee members and sponsors to promote the forum

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ONE WEEK OUT

- Send final registration reminder to participants
- Confirm exhibitors
- Assemble materials for attendee packets, collate the list of participants and include it in the packets
- Confirm arrangements with caterer and venue and all other onsite service providers
- Confirm that all speakers will attend. Provide them with direction to the site and confirm when they should arrive onsite. Also, have speakers send any audio-visual materials for testing.
- Confirm hotel and travel arrangements for out-of-town speakers
- Registration closes
- Ask local papers to print a pre-forum article

ONE DAY OUT

- Give a tour of the facilities for staff, planning committee members and others helping out on meeting day. Confirm everyone will be in attendance and know when to arrive and what their responsibilities are.
- Set up the venue space(s) and test the audiovisual equipment
- Send e-mail reminders to local media contacts

DAY OF THE FORUM

- Arrive early to check set-up and logistics
- Greet speakers, moderators and other participants
- Ensure that all signage is in place and all materials are ready to go
- Test audio visual equipment
- Have representative prepared to greet media and hand out press materials

AFTER THE FORUM

- Thank all the attendees for attending the event
- Thank the team, planning committee, speakers, sponsors, etc.
- Send thank you notes/messages to the site and volunteers who helped set up the event
- Follow up with media contacts, and suggest a post-forum article
- Check final attendance list against the registration list to assess how many of the people invited attended, and how many walk-ins came