

This planner will provide you with a basic list of details you need to manage when planning for a show. Keep in mind that the suggested time frames are only recommendations. Your timetable will differ slightly depending on the complexity of your event. Use this planner as a guideline to develop your personal event planning time line.

Event: _____ Date of Event: _____

Event Theme: _____

Service Contractor: _____

Phone: _____ Fax: _____

Email: _____

PLANNING CHECKLIST

36-48 MONTHS BEFORE SHOW

- Determine event goals and objectives. (Include methods to accomplish goals and methods to measure success)
- Identify possible dates for the event.
- Prepare preliminary event outline to identify event requirements. (Space, meeting rooms, etc.)
- Send meeting requirements to selected sites with requests for written proposals.
- Review site proposals from responding suppliers; select and negotiate potential sites. (Consider the following: Docks, Parking, Lodging, Marshalling Yards, Insurance, etc)
- Conduct site visits as required.
- Negotiate, agree on, and sign contracts with convention center or other facilities or services (ie. airfare and shuttles) the event will use.

18-24 MONTHS BEFORE SHOW

- Establish promotional strategy, including two-year marketing plan and implementation schedule; add related deadlines and requirements. (TIP: Keep your event promotions fresh - In a study of more than 400 trade shows throughout the U.S., the average show loses 20 to 30% of its exhibitors each year.)
- Prepare and mail letters to potential event sponsors requesting consideration.
- Evaluate current and potential markets, and identify target audience(s); review, update, and obtain mailing lists based on evaluation results (e.g., registrants, sponsors, advertisers, and exhibitors).
- Prepare and set preliminary budget. (Tip: Allow additional 15-20% contingency costs)
- Establish meeting theme and preliminary graphics (logo, program, etc.).

19 MONTHS BEFORE SHOW

- Set registration-fee structures & policies, being certain to include clear cancellation policies.
- Review, update, prepare and distribute all policies and procedures including clear cancellation policies governing the event, to all staff, consultants, and committees.
- Identify and outline specific requirements for outside suppliers; decorators, security, airline, car rental, audiovisual, entertainment, destination management (see tips), transportation (see tips), and registration services.
- Assemble exhibitor prospect lists for marketing efforts.

16 MONTHS BEFORE SHOW

- Determine insurance coverage needs.
- Establish exhibit space rates.
- Produce tentative event floor plan.

14-15 MONTHS BEFORE SHOW

- Confirm key speakers and their audiovisual needs.
- Determine food and beverage requirements and negotiate menus and prices.
- Adjust exhibitor floor plan (becomes continuing task from this point on).
- Mail event announcements and promotional materials to prospective attendees and exhibitors.

12 MONTHS BEFORE SHOW

- Review hotel contract deadline dates.
- Review, update, and confirm final meeting budget.
- Begin preparation of conference brochure, including copy, layout, and design.
- Prepare 12-month media schedule and complete media schedules.

- Consider establishing an Exhibitor Hot-Line to begin fielding exhibitor questions.
- If event is annual, consider early exhibitor and attendee registration.

10-12 MONTHS BEFORE SHOW

- Prepare list of available hotel function areas and specifications.
- Compile master list of suggested program topics and speakers.
- Refine master format for general sessions, workshops, luncheons and ancillary events.
- Compare hotel space and specifications and make tentative room assignments of event functions.
- Promote event through appropriate announcements.
- Evaluate target markets and mailing lists in preparation for brochure mailing.
- Promote event through organizational magazine and newsletters.
- Identify event functions and activities available for sponsorship and begin solicitation of sponsors.
- Prepare and mail exhibit prospectus and materials. (Tip: Provide electronic and printed versions)
- Site Inspections: Visit Venue with General Service Contractor to review space

8-10 MONTHS BEFORE SHOW

- Promote event in selected professional publications.
- Follow up on exhibitor mailing.
- Mail first event brochure.
- Establish and implement badge preparation process.
- Identify and develop data collection system(s).
- Prepare expanded event brochure for second mailing.
- Prepare and mail second exhibitor solicitations.
- Begin preparation of hotel function space diagrams for registration, general sessions, workshops, social functions, etc.
- Begin assignment of exhibit space; mail confirmations of space, updates on event activities, function sponsorships, and event program advertising information.
- Implement monthly registration reporting system.
- Begin active solicitation of advertisers for program book.
- Begin determining final event program and schedule.

4-6 MONTHS BEFORE SHOW

- Mail second event promotional brochure to potential attendees.
- Identify materials for registration packets; select and order conference packet.
- Design and print all tickets for admission to event functions.
- Continue solicitation and follow-up of exhibitors, sponsors, and advertisers.
- Begin all food-and-beverage menu selections.
- Order necessary on-site office furniture and equipment.
- Review registrations based on markets; prepare and mail targeted registration invitation letters.
- Identify and assign staff on-site responsibilities.
- Get Fire Marshall Approval on Venue

2-4 MONTHS BEFORE SHOW

- Mail third event promotional brochure to potential attendees if needed.
- Prepare special event issue of newsletter or other periodical.
- Request camera-ready/digital/electronic files ad copy for event program.
- Review and confirm session schedule, room assignments, and function-room diagrams with facilities and appropriate outside suppliers.
- Continue follow-up with exhibitors.
- Order special decorations for event functions.
- Make final food and beverage schedule.
- Review on-site staff needs.
- Determine security needs.
- Prepare and print conference evaluation forms.
- Prepare and print on-site registration forms; check on-site hardware and software.
- Implement weekly registration reporting system.
- Select printer for event program book.
- Review badge preparation process.
- Prepare sign list; order signs.

1-2 MONTHS BEFORE SHOW

- Reconfirm all speakers and their requirements.
- Review exhibit hall floor plan.
- Confirm all food-and-beverage selections.
- Reconfirm all sponsored events.
- Print workbooks and handouts.

- Send final agenda to exhibitors and request list of booth staff personnel.
- Continue follow-up with outside suppliers.
- Confirm and mail detailed requirements to facilities and on-site suppliers.
- Prepare exhibit floor plan, exhibitor list, and schedule for program book.
- Arrange travel and housing for all staff and VIP.

1 MONTH BEFORE SHOW

- Print program book.
- Prepare and print list of pre-registrants.
- Finalize on-site accounting requirements like on-site payments, deposits, cash-out procedures, etc.
- Confirm exhibit layout, and update exhibitor list.
- Schedule on-site media activities.
- Begin preparation of registration packets.

2 WEEKS BEFORE SHOW

- Finalize food and beverage contracts.
- Pack and send all conference materials for early shipment.
- Prepare badges for non-registered attendees. (speakers, exhibitors, complimentary registrations, etc.)
- Communicate all last-minute changes and new requirements to facilities affected suppliers.

1 WEEK BEFORE SHOW

- Finalize agenda for facilities and suppliers.
- Provide required early guarantees to facilities.
- Establish on-site staff meeting schedule and required attendance list.
- Verify VIP arrivals, and schedule airport transportation.

AT THE SHOW

- Receive and inventory all shipments, equipment, and supplies.
- Review all VIP arrangements.
- Set up conference offices.
- Conduct instructional briefings for registration staff, data collectors, volunteers, etc.
- Conduct pre-conference and daily staff meetings.
- Review each day's requirements, and preview following day's requirements.
- Review responsibilities, procedures, and overlap areas like registration, food guarantees, speakers, VIPs, media room setups, data collection, spouse/guest/children's events, exhibits, sponsors, etc.
- Clarify communication lines, authority and responsibility levels with staff and vendors.
- Arrange daily invoice review with event facilities.
- Conduct post-conference wrap-up meeting with event facility departments and suppliers.

NOTES/ADDITIONAL ITEMS:

For additional copies of this event planner, go to > www.valleyexpodisplays.com/planner