

Tips for Planning a Meeting

Get Organized - Set up folders, calendars, and spreadsheets. Draft a timeline and personal checklist. Gather past in-house materials such as invitations, correspondence, and previous quotes. This is especially worth it when you are a first timer. Prepare your budget and set up a detailed budget list.

Brainstorm Sessions - Decide who should be involved in the planning process, then schedule several sessions to ensure you cover everything. In your sessions you should evaluate past events paying attention to what didn't work. Avoid making those same mistakes again and remember that sometimes an event fails simply because it was held on the wrong day or the wrong month.

Submit Request For Proposal - Once you have determined and outlined your goals, objectives and agenda, it's time to write a request for proposal (RFP). Your RFP should be as detailed as possible and cover everything you need from the venue or supplier. Follow up with site inspections if necessary. Ensure you check on the service as well as audio visual equipment.

Confirm Dates, Rates and Details with Suppliers - Make sure to double-check all dates, rates and details with suppliers in advance of your event. Getting confirmation (in writing) on all details prevents nasty surprises the day of event.

Promote Your Event - Publicity for an event has to be planned well in advance since it always takes some time for your audience to receive the message. Think of all available media ... including newsletters, bulletins flyers and social media. Make announcements at meetings of the organizations you want to involve or at related events.

Assign Tasks - Form a team to support your planning from the beginning to the end. Assign different tasks to one or more people. Make sure people are capable of their tasks and know what they can decide on their own and what not. When there are several people working on a task, select a supervisor. Organize regular group meetings to keep track of progress.

Reconfirm Everything - When the days get closer to your event take some time to confirm everything from A to Z. Don't hesitate to contact everybody involved with your event. The most important people should be contacted first. Allow yourself time to come up with "Plan B" should something have changed dramatically.

Train and Brief Staff - Well-briefed staff are essential for a successful event. Tell them what the aim of your event is and what message should be spread. Make them familiar with the location by providing them with photographs or the floor plan of the property. Give each staff member a highly detailed running sheet of the day's events, including who is responsible for each activity and timings.

On the Day - Remember that something usually does, and probably will, go wrong. However, also remember, it's usually only the event organizer who knows about it. Keep a running sheet handy to stay one or two steps ahead of the schedule.

Evaluate, Debrief and Follow up - Request feedback from attendees wherever possible. To gather data, prepare a short survey for all participants. Schedule a meeting with your meeting committee for the week after the event. Discuss what went well and where there was room for improvement. The post-event phase can also include the publication of press bulletins and all kinds of other documentation on the event. Consider a thank-you letter to all participants.