**Meeting Planning Timeline**

One critical strategy for the success of any meeting is advance planning, which requires constructing a schedule and sticking to it. With so many things to remember, a timeline will help you plan and execute your meeting.

**2-3 Months Prior to Meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Set budget |  |  |
| Secure location |  |  |
| Review menus, if appropriate |  |  |
| Draft agenda |  |  |
| Secure additional presenters |  |  |
| Create meeting registration database |  |  |

**1 Month Prior to Meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Send meeting notice with registration link and draft agenda if available |  |  |
| Confirm AV needs with all speakers |  |  |
| Begin gathering handouts |  |  |
| Finalize menu, if appropriate |  |  |
| Confirm who will take meeting minutes |  |  |

**2 Weeks Prior to Meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Send e-mail reminder with draft or final agenda |  |  |
| Finalize all speaker roles and timing |  |  |
| Review budget |  |  |

**1 Week Prior to Meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Create name tags and tent cards for attendees |  |  |
| Assemble meeting packets |  |  |
| Review AV requirements with venue staff |  |  |
| Confirm number of attendees |  |  |
| E-mail final agenda and handouts |  |  |

**Meeting Day Tips**

* Arrive early. Greet guests.
* Makes sure all audio visual equipment is working as intended.
* Put out meeting packets, name tags, and tent cards on tables to make it easy for attendees to pick up materials.
* Dial in to teleconference line at least 10 minutes before meeting begins.

**1 Week Post Meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Send handwritten thank you notes to all speakers |  |  |
| Follow up on any assigned tasks |  |  |
| Review draft meeting minutes |  |  |
| Review budget and invoices |  |  |

**2 Weeks Post meeting**

|  |  |  |
| --- | --- | --- |
| **Task** | **Target Date** | **Completion Date** |
| Finalize meeting minutes |  |  |
| Distribute meeting minutes |  |  |