

# PRE-EVENT CHECKLIST

## PRE-PLANNING TIPS

Pre-planning is one of the most critical parts of meeting planning. Why? Defining the objectives and goals of an event is the key to hosting a successful one.

**1**

### ATTENDEES

- Who is this event intended for? Why is it being planned?
- What is the intended outcome of the event (training, hands-on learning, discussions, decision-driven)?
- Where will attendees be coming from? Will they need air transportation or can they drive to the event?

**2**

### SELECTING A HOTEL/VENUE

- What is the optimum place/venue to get the most ROI and stay within budget? What are the pros and cons of each location?
  - Downtown?
  - Airport?
  - Suburb?
  - Resort?
- What time of year is the event? Is it a good time for the venue or should dates or location be changed to lower the cost?
- Is ground transportation needed?
- Any Outings?
- What type of meeting space is needed (be detailed and as accurate as possible)?
- Will any meals be served?
- Send out RFPs (Request for Proposal) for several bids.

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## 3

### NEGOTIATING WITH THE VENUE

- Does the hotel room rate include WiFi in the room? Is there a resort fee that can be waived?
- What negotiating is there in the room rate? Better rates if date pattern or week was flexible?
- Meeting Room Space – Is the rate reduced or waived based on the Food and Beverage minimums? Do they have the space that you need for the layout you require?
- Food and Beverage – Do the math. Is the minimum amount required within your budget per attendee? Negotiate down if not.
- Audio Visual – Can you use an outside vendor for A/V? What is the discount if using in-house?
- Have legal representation review your contracts – watch out for attrition, cancellation, and other contract clauses that can affect the performance of your event.

## 4

### BUDGET

- Know your budget!
- Who pays the expenses? The host? The attendee? Both? Additional Revenue Streams?
- What are the fixed costs (airline tickets, hotels)? What are the variable costs (AV, Food, and Beverage)?
- Are there any hidden costs to add to the expenses (taxes, services, gratuities, resort fees, taxis)?
- What is the outcome of the event from a budget perspective? Will the budget cover the event? Does the event need to break even?
- Make sure the budget covers all expenses. Determine if revenue from registration or additional streams need to be adjusted.