

Action Planning

Here will you find an overview of necessary steps for the planning process and organization of your event. It should be modified according to your individual needs.

Determine

- the person who will be responsible for individual projects of the planning process
- the date until which the different tasks have to be fulfilled. Always control that the deadlines are being met.

The type and size of your event determines the necessary preliminary planning process.

For the event with

- 200 to 800 participants plan 6 to 12 months in advance
 - for more than 800 participants plan about 2 – 3 years in advance
- Be aware that in big cities like Berlin, Munich, Frankfurt or Hamburg capacities may already be fully booked.

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Conception

Draw up your

- **Event Profile** according to the following points:
 - aim and topic
 - setting
 - date and duration
 - pre-selection of the preferred region or city
- **Delegate Profile** according to the following:
 - type of participants
 - intended number of participants
 - partner of participants

▪ **Budget**

- set up all expenses and revenues
Who bears which costs?
- Search for information about financing and sponsorship
An application for aid program is to be made as soon as possible!

Organizational things beforehand

▪ **Co-operation with a professional service provider?**

- Convention Bureaus – national or regional
- PCO
- advertising agency, PR-agency
- event agency
- incoming agency
- travel agency
- transportation companies
- Official Carrier
- framework agreements
- trade fair construction
- mailing house/ letter shop
- ...

▪ **How could technology support your planning and organizational work?**

- software for
 - booking and registration
 - administration
 - accounting
 - ...
- do you intend to present your conference on your own web page?

▪ **Which kind of insurance cover do you need?**

- liability i.e. for loss of participation
- ...

▪ **Clarify legal requirements for tax!**

▪ **Organize the accounting**

▪ **Draw up a Marketing plan**

- conception
 - Which sorts of media will be used? (trade papers, professional journals, trade shows...)

- Which activities do you plan? (mailings, advertisements, press releases...) Draw up a timeframe!
- Would it be advisable to use the expertise of a professional advertising agency?

- **What do you need during planning, organization and running of your meeting?**
 - **Organizational printing**
 - Business printing
 - Stationery
 - Preliminary
 - Invitations
 - Registration forms
 - Confirmations of reservation
 - Admission ticket
 - Invoices
 - Statement of Inland Revenue
 - Abstract forms
 - Posters
 - Press passes, documents, releases
 - Conference documents
 - Agenda
 - Program
 - Travel information (maps, brochures,...)
 - Questionnaire
 - List of participants
 - List of exhibitors
 - Exhibitor documents
 - Name badges
 - Place cards
 - Menus
 - Abstracts, proceedings
 - ...

 - **Congress materials**
 - Office supplies
 - Congress bags
 - Copybooks, pens
 - Gifts, rewards
 - Brochures about the venue, region and city
 - Name-badges (holder)
 - ...

→ **Now it is time to announce your conference!**

If you plan a conference with more than 800 participants, it is advisable to send more than one announcement!

- **Promote at trade fairs, exhibitions and similar conferences. Use advertisements, posters and so on... Inform potential participants about the date and the place.**
- **Later you should send a direct mailing with main topics and offer opportunity for pre-registration!**

Planning stages

▪ Site selection and venue search

Draw up a list with your requirements regarding to

- meeting rooms
- accommodation

Request for proposal

Site inspection

Booking, Reservation

▪ Program Planning

Business Program

Conception of

- exhibition
- workshops
- speeches and presentations
- discussions
- ...

→ You should possibly set up a Scientific Committee or an Organizing Committee!

Speaker Selection

- Search for speakers – Ask colleagues, friends or a professional speakers' bureau!
- Invitation

→ Speakers management is important - stay in contact with your Speakers at all the time!

Brief them - with all information about the event, advise them early about possible changes,

Host them – set up a speakers lounge or “Ready room”... and

Reward them!

- Coordinate the various abstracts: “Call for Papers”
- Set up the agenda
- Set up the time schedule (incl. breaks)

Social Program

Especially

- the official program for all participants
- the accompanying person's program

Ask for offers and engage an incoming or event agency (DMC)

- organize transfers
- clarify booking conditions like deadlines
- reservation

Complete Program

Set up the time schedule

▪ **Transportation**

- Schedule times
- Clarify transportation requirements
 - air travel, rail travel, road travel
- Are any transfers necessary?
- Are there any parking facilities available? And which capacity is necessary?

▪ **Planning the evaluation afterwards**

- attendee evaluation through questionnaires
To ensure a high response you should distribute the certificate of attendance after the questionnaire has been returned.
- documentation
- statistics
- ...

▪ **Staff requirements/ supporting services during the meeting**

- interpreter
- congress photograph
- technical staff
- hostesses
- admission control and security service
- auxiliary staff
- ...

→ **Now send the invitation with particular information about**

- **the program**
- **arrival and departure times**
- **registration**
- **(registration) fee**
- ...

Planning the details

→ **2 months to one year before**

▪ **Planning catering**

- food and drinks
→ what, when, where and which amount are needed?
- during the conference
- during breaks
- for the social program

- set up the menu plan
- set up the schedule

▪ **Meeting facilities**

→ Details and arrangements with the responsible contact:

What is necessary for

- Workshops, panel discussion, speeches and presentations, exhibition
- Social program and meals?

▪ **Equipment?**

- Seating
- Stage
- Panel
- Lectern
- ...

▪ **Decoration?**

- Flags
- Signposts (in/ outside)
- Logos
- Flowers
- Signage
- ...

▪ **Audiovisuals?**

- Sound, audio engineering
- Image, video engineering
- Light engineering
- Other audio-visual aids
- Telephone and modem points, ISDN line

▪ **Other?**

- Technical staff
- Set-up and break down times
- Testing technical equipment
- ...

Please don't forget to clarify what you need for secretariat/ administration office

- registration
- cloakroom
- storerooms
- speaker's ready room or "green room"
- signage
- closing-off
- security precaution
- ...

"Only a few days to go" - shortly before

→ **One day to 2 weeks before**

- Set up the scenario handbook with
 - meeting points and date
 - details of the arrangements (i.e. equipment)
 - rules of protocol (welcoming sponsors, VIPs ...)

→ Don't forget to update this plan!

- Latest number of participants
 - communicate to
 - the hotel (rooming list)
 - the venue
 - the companies which are responsible for transfers

- Arranging documents like
 - press documents
 - conference documents with
 - schedule
 - agenda
 - questionnaire
 - information about the company, the association ...
 - information about the city (maps)
 - stationary (pens, pads)
 - list of participants
 - list of sponsors
 - ...
 - organization documents with
 - communication list with contact person and telephone number)
 - schedule
 - ...
 - seating plan
- Program control
 - final coordination
 - briefing of all concerned
- Packing list
 - office stationery
 - maps
 - flight schedule
 - ...

On the day of conference

- last controlling of program together with those responsible
- check the
 - rooms
 - technique (A/ V)
 - menu plan
 - ...
- last briefing of all concerned about current changes

Afterwards

- write and distribute
 - press releases
 - the event report
 - cash flow analysis
 - minutes
 - attendance statistics
 - 'Thank you' letters
- meeting to discuss critical points of the conference