

CHECKLIST



This checklist was adapted from the AMA Guide for Meeting and Event Planners by Catherine Price (AMACOM, New York City)

ORGANIZING ON-SITE MANAGEMENT

By Mar a Cooke

BEFORE THE MEETING

- ☐ Arrive two to four days before the meeting.
- ☐ Check on arrival of shipments, and arrange for delivery of equipment/supplies to appropriate on-site locations.
- ☐ Follow up on equipment deliveries to proper areas (staff office, registration, exhibit area, press room, etc.).
- ☐ Begin setting up staff office.
- ☐ Conduct pre-con meeting.
- ☐ Provide updates on attendee counts and guarantees to hotel and outside suppliers.
- ☐ Contact other suppliers (ground transportation, destination management company, audiovisual company, florist, etc.) to confirm details of service.
- ☐ Conduct briefings for registration team, staff office, door monitors, airport greeters and all other personnel for the meeting, both paid and volunteer.
- ☐ Set up registration area and oversee setup of other areas (exhibit hall, general session area).
- ☐ Coordinate distribution of VIP gifts or amenities to attendees' rooms.
- ☐ Check cleanliness and proper functioning of elevators, rest rooms and other public facilities.
- ☐ Handle advance room check-in for VIPs and key meeting participants, such as speakers.
- ☐ Identify resources near the hotel (secretarial services, photocopying center, office supplies, florists).

DURING THE MEETING

- ☐ Check hotel reader board daily for accuracy.
- ☐ Meet daily with key hotel and meeting staff.
- ☐ Check each meeting room for accurate setup 30 to 60 minutes prior to the start of the function. (Do microphones and audiovisual equipment function properly? Is a pitcher of water, with ample drinking glasses, set up for speakers? Are session materials ready for distribution?) Allot more time

- ☐ before a major session.
- ☐ Check all food and beverage areas for readiness and accuracy 30 to 60 minutes prior to function. Allot more time before a special event, such as an awards banquet.
- ☐ Remove cash from safety deposit box and set up cash boxes for each registration worker.

- ☐ As large amounts of registration income are received, balance cash against registration records, and place in safety deposit box or local bank account.
- ☐ Conduct personnel check-in to make sure all have arrived and are at assigned areas.
- ☐ Provide personnel with items needed for daily activities, such as function sheets and evaluations for door monitors.
- ☐ Check to be sure all speakers have arrived and will be at their appropriate sessions on time.
- ☐ Assign staff to conduct and record attendee counts in meeting rooms.
- ☐ Pick up messages regularly from staff office, and maintain ongoing communications with suppliers and personnel.
- ☐ Review charges from hotel and suppliers daily.
- ☐ Obtain a daily printout of guest rooms used by your group.

AFTER THE MEETING

- ☐ Have all cash transferred to your organization's bank account, or request a cashier's check for safe transport home.
- ☐ Prepare thank-you notes for hotel staff and suppliers, and distribute individual gratuities.
- ☐ Conduct a post-conference meeting with event staff and hotel staff.
- ☐ Pack all conference materials and equipment for return shipment home; arrange for shipping.
- ☐ Inventory all equipment rented locally, and supervise supplier pickup.
- ☐ Review final bill with accounting, and make required payments on uncontested portion of bill.

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