#### Simple Conference Project Plan Template

Below is a sample list of tasks that may be associated with an event. Tasks will vary from event to event. These range from keynote, session and reception components to contracts, budgets, meetings, agenda, correspondence and advertising to registration and evaluation. Readers with project management expertise can incorporate pieces as needed into their own project plans.

|  |
| --- |
| **[Event name]** |
| **[Date]** |
|  |  |  |  |  |  |
|  | **Task Name** |  **Target Date** | **Actual Date** | **Responsibility** | **Comments** |
|  |  |  |  |  |  |
|  | Draft RFP for Event Planner |  |  |  |  |
|  | award contract |  |  |  |  |
|  |  |  |  |  |  |
|  | **Meetings** |  |  |  |   |
|  | Pre-meeting |  |  |  |  |
|  | Meet the contractor |  |  |  |  |
|  | Second meeting |  |  |  |  |
|  | Third meeting |  |  |  |  |
|  | Onsite visit |  |  |  |  |
|  | Facility mgr/event planner and partners Meeting |  |  |  |  |
|  | **Agenda** |   |   |   |   |
|  | Create Agenda Document Populate with times |  |  |  |  |
|  | Populate with Tracks/Sessions/Speakers |  |  |  |  |
|  | Final agenda for online registration  |   |  |  |  |
|  | Assign Room Numbers based on Pre-Registration Counts |  |  |  |  |
|  | **Attendee Reception**  |   |   |   |   |
|  | Create Budget |  |  |  |  |
|  | Catering |  |  |  |  |
|  | Entertainment |  |  |  |  |
|  | Raffle |  |  |  |  |
|  | Update as cancellations/speaker changes occur  |  |  |  |  |
|  | **Conference Audio Visual** |   |   |   |   |
|  |  Keynotes facility needs |  |  |  |  |
|  | Contact AV company with requirements and quote |  |  |  |  |
|  | contract |  |  |  |  |
| **** | Plan for Projectors and Laptops |  |  |  |  |
|  | **Budget** |   |   |   |   |
|  |  Budget |  |  |  |  |
|  | **Call for Presenters** |   |   |   |   |
| **** | Create Call for Presenters Submittal form  |  |  |  |  |
| **** | Create Contact Information Spreadsheet of Potential Presentations |  |  |  |  |
| **** | Email 'Call For' paperwork to spreadsheet distribution |  |  |  |  |
|  | **Catering Conference** |   |   |   |   |
|  | Identify caterer (bid or as required by facility) |  |  |  |  |
|  | Request morning setup, Lunch, water in rooms for speakers |  |  |  |  |
|  |  |  |  |  |  |
|  | Agree upon setup and timeframes i |  |  |  |  |
|  | Quote -  |  |  |  |  |
|  | Communicate Final Numbers (wk in advance) depends on pre-registration |  |  |  |  |
|  | **Catering VIP** |   |   |   |   |
|  | Identify caterer |  |  |  |  |
|  | Menu |  |  |  |  |
|  | Discuss setup and timeframes in Place |  |  |  |  |
|  | Quote |  |  |  |  |
|  | Contract |  |  |  |  |
|  | Communicate Final Numbers |  |  |  |  |
|  | **Conference Branding/Theme Design** |   |   |   |   |
|  | Logo |  |  |  |  |
|  | Save the Date Postcards designed |  |  |  |  |
|  | VIP Reception Invitations designed |  |  |  |  |
|  | Brochure designed |  |  |  |  |
|  | Name Tags |  |  |  |  |
|  | **Facility** |   |   |   |   |
| **** | Reserve facility rooms |  |  |  |  |
|  | Contract and equipment needs form |  |  |  |  |
|  | Meet with facility Staff (usually wk. before conference) |  |  |  |  |
|  | Arrange for Speaker Ready Room |  |  |  |  |
|  | Set-up Day Before |  |  |  |  |
|  | Hang Registration Signs |  |  |  |  |
|  | Deliver Request Forms |  |  |  |  |
|  | **Keynote Conference** |   |   |   |   |
|  | List of Keynotes |  |  |  |  |
|  | Draft invitation  |  |  |  |  |
|  | Confirm Keynote |  |  |  |  |
|  | Get Photo and Bio |  |  |  |  |
|  | Line up Person to Introduce  |  |  |  |  |
|  | Schedule Rehearsal at facility if needed |  |  |  |  |
|  | Thank You Notes |  |  |  |  |
|  | **Keynote VIP Reception** |   |   |   |   |
|  | List of Keynote suggestions(CEO's) |  |  |  |  |
|  | Draft invitation  |  |  |  |  |
|  | Confirm Keynote |  |  |  |  |
|  | Get Photo and Bio |  |  |  |  |
|  | Schedule Rehearsal at facility |  |  |  |  |
|  | Thank You Notes |  |  |  |  |
|  | **Host Booth** |   |   |   |   |
|  | Coordinate internally |  |  |  |  |
|  | **Marketing / Advertising** |   |   |   |   |
|  | Get a proposal from RFP process |  |  |  |  |
|  |  |  |  |  |  |
|  | Press Releases cleared  |  |  |  |  |
|  | **Mailing Lists** |   |   |   |   |
|  | **Identify audience** |  |  |  |  |
|  | Prep Save the Date Postcard |  |  |  |  |
|  | Prep VIP Reception |  |  |  |  |
|  | **Name Badges** |   |   |   |   |
|  | Get Quote to Print and Stuff Name Badges |  |  |  |  |
|  | Calculate attendee/exhibitor/speaker/host/staff numbers |  |  |  |  |
|  | Order name badge holders, ribbons and carrier containers |  |  |  |  |
|  | Deadline to have pre-registered to printer |  |  |  |  |
|  | **Direct Mailing** |   |   |   |   |
|  | Mailings |  |  |  |  |
|  | Postcards: Labeling and Postage Quote |  |  |  |  |
|  |  mail Postcards |  |  |  |  |
|  | VIP invites: Labeling, Stuffing and Postage Quote |  |  |  |  |
|  | Mail Invitations with Bio Cards |  |  |  |  |
|  | **Presenters** |   |   |   |   |
|  | Identify Presenters from Submittal Form |  |  |  |  |
|  | Update Presenter Release Form |  |  |  |  |
|  | Draft Acceptance Letters and email to Presenters |  |  |  |  |
|  | Draft Regret / Alternate Speaker Letter and email |  |  |  |  |
|  | Develop List of Alternate Speakers in case of cancellations |  |  |  |  |
|  | Develop Presenter Tracking Spreadsheet |  |  |  |  |
|  | Equipment Needs, Hotel, Bio, Presentation, Release Form |  |  |  |  |
|  | Email Agenda |  |  |  |  |
|  | Invite to VIP Reception |  |  |  |  |
|  | Presenter Package to hand out at Conference |  |  |  |  |
|  | Send out Thank you Letters and Evaluation Results |  |  |  |  |
|  | **Printing** |   |   |   |   |
|  | Save the Date Postcards (Get Quote) |  |  |  |  |
|  | determine quantity |  |  |  |  |
|  | Submit Info to printer |  |  |  |  |
|  | Review and Edit |  |  |  |  |
|  | Final |  |  |  |  |
|  | Invitations - VIP (Get Quote) |  |  |  |  |
|  | determine quantity |  |  |  |  |
|  | Submit Info to printer |  |  |  |  |
|  | Review and Edit |  |  |  |  |
|  | Final |  |  |  |  |
|  | Double Sided Biography card to be inserted in VIP Invitation |  |  |  |  |
|  | Program Brochure |  |  |  |  |
|  | determine quantity |  |  |  |  |
|  | Submit Info to printer |  |  |  |  |
|  | Review and Edit |  |  |  |  |
|  | Final |  |  |  |  |
|  | Speaker Presentations / Evaluation Sheets |  |  |  |  |
|  | Addendums |  |  |  |  |
|  | Poster files to Printer |  |  |  |  |
|  | Day 1 Agenda |  |  |  |  |
|  | Day 2 Agenda |  |  |  |  |
|  | Main Conference |  |  |  |  |
|  | Main Conference Directional |  |  |  |  |
|  | Featured Speakers |  |  |  |  |
|  | Featured Speakers Directional |  |  |  |  |
|  | Keynote Conference |  |  |  |  |
|  | Keynote Directional |  |  |  |  |
|  | Keynote VIP Reception |  |  |  |  |
|  | Meeting Room Schedule |  |  |  |  |
|  | Attendee Reception |  |  |  |  |
|  | Attendee Reception Directional |  |  |  |  |
|  | Academic Symposium Signs  |  |  |  |  |
|  | Exhibitor  |  |  |  |  |
|  | Sponsorship |  |  |  |  |
|  | **Program Book Creation** |  |   |   |   |
|  | Attendee Reception Blurb |  |  |  |  |
|  | Welcome Letter |  |  |  |  |
|  | Agency Logos |  |  |  |  |
|  | Conference Host Bio's |  |  |  |  |
|  | Tracks Day 1 & Day 2 |  |  |  |  |
|  | Presenter Bios |  |  |  |  |
|  | Sponsorship Recognition |  |  |  |  |
|  | Exhibitor/Sponsor Profiles |  |  |  |  |
|  | Save the Date Page for Next year |  |  |  |  |
|  | **Registration - Conference** |   |   |   |   |
|  | Online |  |  |  |  |
|  | Go Live |  |  |  |  |
|  | Close Down Walk-ins welcome |  |  |  |  |
|  | Onsite |  |  |  |  |
|  | Computers & printers reserved |  |  |  |  |
|  | Create Check-in Sheet for each group |  |  |  |  |
|  | Attendees |  |  |  |  |
|  | Exhibitors |  |  |  |  |
|  | Speakers |  |  |  |  |
|  | **CLE** |   |   |   |   |
|  | Contact CLE authorizing organization |  |  |  |  |
|  | Develop Sign-in Sheet |  |  |  |  |
|  | Tally Credits |  |  |  |  |
|  | Send Certificates to be signed |  |  |  |  |
|  | Send Certificates to recipients |  |  |  |  |
|  | **CPE** |   |   |   |   |
|  | Sign-in Sheet |  |  |  |  |
|  | Tally Credits |  |  |  |  |
|  | Send Certificates to recipients |  |  |  |  |
|  | **Registration - VIP** |   |   |   |   |
|  | Online |  |  |  |  |
|  | Go Live |  |  |  |  |
|  | Onsite |  |  |  |  |
|  | Create Check-in Sheet |  |  |  |  |
|  |  **Sponsors & Exhibitors** |   |   |   |   |
|  | handled by event planner or other organization  |  |  |  |  |
|  | solicitation  |  |  |  |  |
|  | Status reports on sponsors & exhibitors |  |  |  |  |
|  |  |  |  |  |  |
|  | **Theater** |   |   |   |   |
| **** | Reserve Theater |  |  |  |  |
|  | Arrange Set-up and Rehearsal Times |  |  |  |  |
|  | hold rehearsal |  |  |  |  |
|  | **VIP Reception** |   |   |   |   |
| **** | Reserve Palace |  |  |  |  |
|  | Coordinate Setup  |  |  |  |  |
|  | Audio Visual for Keynote  |  |  |  |  |
|  | Setup of Theater |  |  |  |  |
|  | Podium |  |  |  |  |
|  | Microphone |  |  |  |  |
|  | Easels |  |  |  |  |
|  | **Volunteers** |   |   |   |   |
|  | Develop Meeting Room Assignment Document |  |  |  |  |
|  | Recruit Volunteers |  |  |  |  |
|  | VIP Check In  |  |  |  |  |
|  | Attendee Registration separate people than access control people |  |  |  |  |
|  | Exhibitor Registration  |  |  |  |  |
|  | Speaker Registration 1 person |  |  |  |  |
|  | Meeting Room Access Control  |  |  |  |  |
|  | CLE/CPE Check-off |  |  |  |  |
|  | Distribute/Retrieve Handouts |  |  |  |  |
|  | Arrange for volunteer Parking |  |  |  |  |
|  | Develop Procedure Documents |  |  |  |  |
|  | **Website** |   |   |   |   |
|  | Conference Website |  |  |  |  |
|  | Save the Date |  |  |  |  |
|  | Call for Presenters |  |  |  |  |
|  | Agenda |  |  |  |  |
|  | Academic Symposium |  |  |  |  |
|  | Exhibit / Sponsor link to event planner site |  |  |  |  |
|  | Driving Directions / Parking |  |  |  |  |
|  | Accommodations |  |  |  |  |
|  | Attendee Reception |  |  |  |  |
|  | Bios / Photos |  |  |  |  |
|  | Presentations |  |  |  |  |
|  | Attendee / Registration  |  |  |  |  |
|  | VIP Registration  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  | **Closeout** |  |  |  |  |
|  | Reconcile invoices to budget |  |  |  |  |
|  | compile speaker evaluations  |  |  |  |  |
|  | debrief with partners |  |  |  |  |