

## Planning a Meeting Checklist

Date of Event: \_\_\_\_\_

Speaker: \_\_\_\_\_

Topic: \_\_\_\_\_

### I. Eight to ten weeks before the event

- Schedule the date of the event

**Helpful Hints:**

- Check the date against the ASTD meeting for other events
  - Have it on a month that the ASTD Chapter meeting does not meet, if possible
- Reserve a meeting room; check set-up for arrangement of tables, chairs, maximum number of attendees, etc.
  - Get a sponsor for the meeting
  - Book the speaker and discuss speaker's topic
  - Let VP of SIG/GIG know of event
  - Follow ASTD process to announce event on the ASTD Chapter web site

### II. Two to four weeks before the event

- Reconfirm with guest speaker – Ask if there are technology needs
  - Ask for speaker's bio to present him/her before the meeting
  - Write an article for the ASTD Chapter newsletter
- Helpful Hint:** Ask the speaker to write an article – some love to do it!
- Send an email and RSVP to the SIG/GIG group email list to promote the event
  - Get info to promote the sponsor
  - Market the meeting through other sources (websites, etc.)

### III. One week before the event

- Create agenda
- Bring ASTD flyers to promote the ASTD organization
- Check in with the speaker – does he/she need directions, where to park, etc.
- Check room for laptop connectivity, if needed
- Secure projector, if needed
- Determine food and beverages for event
- Get small, appreciative gift to thank speaker at event
- Get wrapping bag and tissue paper for gift

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- Prepare what to say to present speaker to attendees
- Make copies of Sign-In sheets for sign-in of those who attend  
*Helpful hint:* This is where you get your email list and SIG committee members.
- Make copies of the standard survey to determine audience reaction and feedback
- Send reminder email and RSVP notice to the SIG/GIG list
- Buy Name Badge Labels and magic marker for meeting

### IV. Day before and/or Day of the Meeting

- Set up room for event
- Bring Sign-In sheets and pen(s)
- Bring paper Name Badge Labels and Markers
- Bring fee receipts ready, if there is a charge
- Alert security in the building of the event, if needed
- Bring standard surveys
- Buy/bring food, soft drinks and ice for event
- Bring ice cooler
- Buy/bring paper products
- Save any receipts for reimbursement
- Open room and set up ½ hour before the event
- Bring writing tablet to take any notes
- Bring wrapped appreciative gift for speaker

### V. One to ten days after the meeting

- Review results of the survey
- Contact VP of Finance and follow process for receipt reimbursement