

Step-by-Step Guide to Planning a Successful Conference

18–12 Months Before: Foundation & Contracts

- Issue a Request for Proposal (RFP) to secure a hotel or venue
 - Evaluate proposals, negotiate terms, and finalize contracts
 - Develop a preliminary budget, including:
 - Venue and meeting space
 - Food & Beverage (F&B)
 - Audio-Visual (AV) and conference supplies
 - Staffing and travel
 - Marketing and materials
 - Swag and giveaways
 - Use budget projections and early sponsorship insights to:
 - Set registration rates
 - Determine financial goals (break-even or profit)
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12 Months Before: Strategy, Sponsorship & Marketing Launch

- Define the conference theme, goals, and overall vision
- Begin securing keynote speakers and session leaders
- Finalize registration rates

Sponsorship Development

- Begin outreach to potential sponsors
- Create sponsorship packages, levels, and pricing
 - Prioritize high-value, low-cost benefits (speaking opportunities, branding, giveaways)
- Develop sponsor agreements/contracts
- Set up sponsorship items in your system (e.g., NEMO) for invoicing

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- Create a tracking system for sponsor revenue and payments
- Identify target sponsors (past sponsors, universities, industry partners)
- Conduct outreaches every 6–8 weeks
- Publish sponsorship opportunities on your website

Marketing Launch

- Launch conference website and promotional campaigns
 - Send a Save the Date announcement to your [listserv](#)
 - Begin social media promotion
 - Post updates every 4–6 weeks
 - Increase to weekly posts beginning 2 months out
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6 Months Before: Program Development

- Finalize and publish paper guidelines
 - Announce Call for Papers/Abstracts via listserv
 - Open abstract submission system
 - Invite reviewers (ideally before or immediately upon opening submissions)
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5–4 Months Before: Abstract Review Process

- Keep abstract submissions open for 2–3 weeks
 - Send reminder emails promoting submissions and early registration
 - Allow 1–2 weeks for reviewer evaluations
 - Allow 1 week for final decisions (accept/reject)
 - Update website with sponsor logos
 - Begin registering sponsor attendees
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4 Months Before: Draft Submission & Review

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- Authors submit first drafts (within 2 weeks)
 - Reviewers evaluate drafts (1–2 weeks)
 - Allow 1 week for decisions:
 - Accept
 - Reject
 - Request revisions
 - Send housing announcement (open hotel room block)
 - Remind attendees of registration deadlines and early bird rates
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3 Months Before: Revisions, Final Papers & Supplies

- Authors submit revised drafts (if required) within 1 week
- Reviewers evaluate revisions within 1 week
- Final decisions made within 1 week
- Authors submit final “**show-ready**” papers (within 4 weeks)
 - This version will be published
- Send reminders for author registration and final deadlines

Order Conference Supplies

- Shipping materials (boxes, crates)
- Badges and materials:
 - Badge stock, holders, lanyards
 - Ribbons (author, presenter, program chair, etc.)
- Office supplies:
 - Pens, paper, staplers, tape, scissors, etc.
 - Backup printer ink
 - Hand sanitizer, tissues
- Signage materials (acrylic frames, QR code displays, Wi-Fi info)

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- Return shipping labels (FedEx/UPS)
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3–2 Months Before: Program & Agenda Finalization

- Finalize conference agenda:
 - Technical sessions
 - Panels
 - Workshops
 - Assign finalized papers to sessions
 - Confirm all speakers and authors are registered
 - Send reminders for registration and housing deadlines
 - Provide sponsors with shipping, logistics, and onsite details
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3 Months Before: Logistics & Catering

- Make initial menu selections
 - Confirm F&B flow and service style
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2 Months Before: Program Production

- Notify editorial/design team of program requirements
 - Develop production schedule, including:
 - Editing (≈2 weeks)
 - Layout/design (≈2 weeks)
 - Printing (≈2+ weeks if applicable)
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6 Weeks Before

- Submit final program content for editing (if printed)
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30 Days Before: Key Confirmations

Audio-Visual (AV)

- Finalize AV requirements based on program schedule
- Obtain quotes from venue and external providers
- Selecting vendor based on cost and service

Security

- Develop security schedule based on event layout
 - Confirm coverage for:
 - General session
 - Registration
 - Exhibit areas
 - Book security (30+ days in advance for best rates)
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30–14 Days Before: Internet & Electrical

- Confirm electrical and internet needs:
 - General session
 - Registration
 - Exhibitor areas
 - Order hardline internet if required for presenters
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18 Days Before: Printed Materials

- Submit signage and materials for printing
 - Allow ~10 business days for production
 - Review and approve proofs
 - Ensure delivery aligns with shipping schedule
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3 Weeks Before: Final Checks

- Finalize catering guarantees
 - Review and adjust budget
 - Confirm:
 - Room setups
 - AV requirements
 - Staffing plans
 - Registration numbers
 - Confirm all sponsor payments
 - Send sponsor artwork requirements (signage, branding)
 - Send “**Know Before You Go**” email including:
 - Agenda
 - Speaker highlights
 - Logistics and expectations
 - Dietary request collection
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Final Month: Execution Preparation

- Finalize all sessions and schedules
- Confirm speaker participation

Finalize Program

- Complete final edits and proofreading
- Apply final design updates
- Send to print or publish online

Prepare Onsite Materials

- Staff assignments and schedules
- Signage and registration materials

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- Presentations and scripts
 - Sponsor materials and presentations
 - Send final “Know Before You Go” update
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10–7 Days Before: Shipping

- Ship materials to venue (arrive 3–4 business days prior)
- Use tracked shipping (e.g., FedEx Express Saver)
- Avoid weekend delivery if venue receiving is closed
- Prepare return shipping labels (FedEx Ground or expedited if needed)

Key Takeaway

Successful conferences are built on early planning, consistent communication, and disciplined timelines.