



Tell Us About Your Needs

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www.theconferenceplanner.ca

Fill out this form and return by fax. An estimate will be provided.

Date _____

Completed By _____

Organization _____

Contact _____ Phone _____

Email _____

Conference Name _____

Conference Date(s) _____

Expected Numbers:

Participants _____

Keynote Speakers _____

Exhibitors _____

Presenters _____

Volunteers _____

Committee Mbrs: _____

Describe the format of the conference.

Example:

Day 1 – Evening only – conference opening with keynote speaker

Day 2 – Full day - Quarter-day workshop sessions (4 in total). 5 workshop choices each session.

Day 3 – Extended Morning – plenary/group work and closing keynote speaker

Where did you hear about us?

Yellow Pages

Colleague / Friend

Newspaper

Other. Please Specify _____

Identify the services you wish to contract out.

Planning Meetings

- Conduct initial planning meeting to assess needs and services required
- Participate in planning committee meetings

Startup

- Prepare detailed budget estimates and timeline management
- Advise on agenda development
- Create initial draft of all marketing materials (flyer, program/brochure, registration form)
- Create custom logo/theme for conference
- Create a temporary conference website with online registration system
Payment methods: cheque purchase order secure credit card payments
(online only)

-or-

- * Create a permanent conference website with online registration system (*quoted separately)
Payment methods: cheque purchase order secure credit card payments
(online only)

Venue Coordination

- Source and recommend appropriate venue
- Negotiate and execute venue contract
- Arrange and confirm details for meeting rooms and banquet room setup
- Arrange and confirm AV equipment needs
- Arrange and manage hotel rooms group booking
- Advise and arrange for meals and refreshments
- Arrange space and setup of exhibitor displays

Sponsorship Program Development

- Evaluate the sponsorship potential and determine goals
- Define sponsorship levels and appropriate deliverables
- Create the sponsorship sales prospectus
- Create and manage sponsor marketing program

- Manage and coordinate collection of all sponsor materials
- Invoice and collect sponsorship fees

Speaker Coordination

- Prepare, send out, manage timely collection of speaker submission packages
- Arrange and book travel and hotel details
- Manage timely collection of speaker bios and workshop descriptions
- Manage timely collection of AV equipment needs and coordinate with venue
- Manage timely collection of speaker materials/handouts and prepare appropriate copies

Travel and Accommodations

- Arrange group booking number for hotel rooms
- Arrange group booking number for airfare
- Book hotel rooms for speakers and send confirmation
- Book air travel for speakers and send confirmation

Exhibitor Coordination

- Prepare exhibitor invitation package
- Accept exhibitor registrations by mail by fax by email online
- Prepare and send confirmation notices
- Arrange and confirm exhibitor display setups
- Invoice and collect exhibitor fees

Volunteers

- Prepare volunteer invitation package (areas of participation)
- Accept volunteer registrations by mail by fax by email online
- Prepare and send confirmation notices

Attendee Registration

- Accept registrations by mail by fax by email online
- Prepare and send confirmation notices
- Maintain accurate registration database
- Prepare timely Registrar Update Reports and submit to planning committee
- Invoice and collect registration fees
- Prepare cheque deposits (if cheque payments accepted)

Attendee and Speaker Packages

- Advise, recommend, order conference memento/merchandise (folder, bag, etc)
- Print and assemble handout materials
- Assemble packages
- Design and print individual name badges/tags

On-Site Management

- Manage all on-site logistics and liaise with venue staff
- Manage attendee and speaker arrivals
- Oversee A/V equipment coordination
- Manage Check-In Station(s) provide extra staffing
(registrar station, attendee check-in lines, speaker check-in)

Post-Conference

- Compile and tabulate evaluations
- Reconcile attendee registration fees
- Prepare conference summary report

Miscellaneous

- Design conference notepads 5.5 x 8.5 8.5 x 11
- Develop a Conference CD
- Design PowerPoint presentations
- * Plan and coordinate activities, tours, entertainment (*quoted separately)