

knowledgebridge

Event Milestone Template

Project Responsibilities

Deliverable

Start Date

End Date

Phase I - Event Design

Project and Risk Management –

Conference planning timeline and work plan		
Develop a list of teams and contact information		
Develop team meeting schedule		
Weekly reporting		
Risk assessment and contingency planning		
Development of risk management plan		
Review health and safety requirements		
Security review		

Core Values and Benchmarks –

Establish goals and objectives for the program		
Review event history of the organization		

Financial Management -

Develop the conference budget		
Develop a revenue generation program (sponsorships and exhibitor plan)		
Budget review and maintenance		
Invoice review		
Post-conference financial report		

Conference Site Liaison -

Meal selections and banquet orders		
Contract reviews		
Meeting room allocations		

Phase II – Implementation*

Registration Management-

Develop and deliver registration package		
Develop participant requirements and preferences		
Research and provide accommodation/travel		
Monitor registration and registration reporting		
Send registration confirmations and receipts		
Develop list of conference attendees		



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Program and Speaker Management -

Establish conference theme		
Development of a meeting pattern		
Develop a call for speakers, review submissions		
Send out notices of decision		
Obtain speaker agreements (fees, travel and accommodation)		
Speaker management (contracts, descriptions, biographies)		
Work with speakers and selected entertainers by the volunteer committee to ensure adequate preparation		
Develop day-to-day conference program (in consultation with program committee)		
Draft and send thank you letters for speakers, exhibitors and volunteers		

Exhibit Management -

Draw up layout of exhibit hall		
Establish the maximum number of exhibitors for space		
Create a list of potential partners		
Prepare and disseminate exhibitor package		
Develop list of registered exhibitors		
Assignment of booth space		
Creation of exhibit hall map		
Send out exhibitor confirmation letters		
Ensure satisfaction of partners, ensuring all benefits are provided as advertised		

Volunteer Management -

Determine a Volunteer Program (Call For Volunteers And Recognition)		
Assign a volunteer photographer		
Volunteer on-site orientation session		

Attendee Experience and Communication -

Review and Develop a Communication Plan		
Prepare text for web page on partnership opportunities, conference seminar details		
Communicate with attendees as required		
Development of thematic "story" (in consultation with social committee)		
Entertainment research and contracting		
Overall décor		
Liaise with social committee on food and beverage		



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Gala Dinner, Gifts and Awards -

Design and produce Gala Awards Dinner		
Research and propose potential gifts and awards		
Work with partners on selection and delivery of gifts		
Order and purchase gifts and awards		

Materials and Printing -

On and off-site signage design and production		
Conference program/agenda design and content		
Conference kit selection		
Printing contracting and coordination		
Mail house contracting and coordination		
Order conference bags		
Conference and registration folder assembly		
Print badges		

Audio Visual and Multi-Media -

Determine requirements		
Research suppliers and contracting		
Work with speakers to develop presentations		
Finalize AV requirements and contracting		

Phase III – On-Site Management

On-Site Plan -

Registration/ information desk procedures		
Onsite plan communication		
Hold daily meetings to ensure lines of communications remain open at all times		
Ensure all facilities are set up as required		
Ensure the logistics for the registration/information desk for duration of conference effectively and efficiently		
Ensure all partners/sponsors are prominently showcased according to their sponsorship levels		
Provide administrative services as required to guests		
Coordinate emergency management services, as required		
Coordinate and distribute attendee gifts if applicable		



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Phase IV – Post- Conference Management

Project Responsibilities	Deliverable	Start Date	End Date
Conference and evaluation review			
Collation of evaluation data			
Post mortem meeting			
Thank you letters and mailing of post conference collateral			
Final report and delivery of conference data			

*** During the implementation phase of this timeline one month prior to conference you should:**

- ✓ Ensure printed materials are delivered to the appropriate locations
- ✓ Review Security and Health and Safety requirements
- ✓ Ensure proper security measures are in place
- ✓ Reconfirm all entertainers, speakers, and suppliers

Arrange and attend pre-conference meetings with the third party suppliers and conference facilities and other venue(s) to finalize:

- ✓ Banquet orders, meal numbers and requirements
- ✓ Meeting room requirements
- ✓ Other facility requirements, e.g. parking, supply delivery

Review Responsibilities with all parties involved:

- ✓ Review conference details and ensure areas of responsibilities are clear
- ✓ Complete Conference Script schedule



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