

Conference and Event Planning and Follow Up Worksheet

Pre-Conference Planning		
• Go/No-Go		
○ Goals for the event:		
○ Who do we want to meet?		
○ Sponsorship? Cost?		
○ Who should attend?		
○ Budget		
Pre-Conference Marketing		
• Attendee list		
○ Send outreach info		
○ Schedule dinners/events		
○ Schedule one-on-one meetings (coffee/drinks)		
• Exhibiting		
○ Booth		
○ Collateral materials/brochures		
○ Booth Give-aways		
Post Conference		
• Conference writeup		
○ Who did I meet?		
▪ Follow up assignments		
○ Who didn't I meet?		
▪ How I plan on following up		

• Outreach		
○ calling		
○ emailing		
• Event analysis		
○ Return on investment		
○ What would I do differently?		
○ Will we attend again?		