



**SMART**  
*Conference Planning*

*How to plan and host  
a successful conference*

# SMART Conference Planning

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# Introduction

Hosting a conference takes time and effort. Preplanning and good organization are the keys to success.

For a short conference with a small audience, you might be able to do much of the work, whereas a larger, more complex conference may require assistance from experts, such as a professional conference planner, speakers bureau representative, caterer, writer, editor, designer, and Web designer.



Whether you're working alone or with several others, you'll need to answer some basic questions before you decide whether you want to hold a conference.

- **Who?** — Who is the audience, and how will you invite them? How many people might attend? Who will the speakers be? Who will organize the conference?
- **What?** — What is the primary purpose of the conference? What do you want participants to learn? What resources will be needed, and how much money will it cost?
- **When?** — When will the conference be held? When is the best time to reach your audience? When should you start planning in order to be ready?
- **Where?** — Where will your conference be held? Which facilities are adequate for your event, and are they available? Will travel, lodging, and meals be required?

## STRATEGIES

One of the ways to stay organized is to have some strategies in place that will help you as you move through the process.

- ✓ Identify a clear purpose and audience for your conference.
- ✓ Prepare the content to match the needs of the audience.
- ✓ Use a timeline to set deadlines, and keep them.
- ✓ Create a budget.
- ✓ Seek help and advice from others.
- ✓ Create clear, professional marketing and support materials.
- ✓ Promote your conference early for better attendance.
- ✓ Confirm dates and details with your facilities and speakers.
- ✓ Double check details before and during the conference.
- ✓ Evaluate the conference after it's over to make improvements for future events.

## Smart Content —

### Develop the conference.

Start by determining the purpose of the conference. Does the topic warrant the time, expense, and effort needed to host a successful conference? Identify the message clearly for the presenters and the audience. Remember to stay focused on that message so you communicate it effectively during the conference.

Establish what resources are available to you and the approximate structure of the conference you'd like to hold. Start with the basics, and then expand as resources allow. It's quality — not the length of time and size of the audience — that makes a successful conference. Simple conferences might include a few of the elements listed below, while more complex events might include the following:

- Registration — How will attendees register: online, by mail, or on-site?
- Presenters — How many speakers will be needed? What will your budget allow? Will there be travel time and expenses?
- Facilities — Where will you hold your conference? Does it have the equipment your presenters will need?
- Sessions — How many sessions will be needed? How much variety should you include?
- Committee meetings — Do you need to conduct organization business separately? When is the best time to do this?
- Workshops/roundtables — Will there be hands-on training? Will there be an informal exchange of information?
- Vendors/sponsors — Will sponsors and advertising provide additional information and resources — and possibly revenue?
- Lodging block(s) — Will your speakers, vendors, and attendees need lodging?

- Tours/trips — Will you include any organized educational or recreational activities for attendees?
- Food/awards — Will you provide refreshments or hold a banquet? Will awards will be presented?
- Conclusion — Will any follow-up be required? Will you ask attendees to evaluate the event?



As you plan your message, consider the audience, their background, needs, and interests.

Will that affect how you present your material? Is your audience small and easily identified or larger and more diverse? Either way, you'll need to keep the content relevant and present it clearly to the attendees.

Consider the following questions:

- Education — Is the information tailored to your audience's educational background?
- Age — Are your marketing and support materials tailored for your intended audience?
- Economic background — Will attendees have computer access for online promotional or registration materials? If not, then what? Are the registration fees and travel costs affordable?
- Geography— Will the audience be rural or urban? Will you be hosting international visitors?
- Occupation — Do the attendees share a common occupation, or will there be a variety of jobs represented? Are there industry terms or procedures that you'll need to use?
- Accessibility — Will your materials or facilities accommodate those with different needs?
- Skill level — How much knowledge will attendees have about your topic(s)?

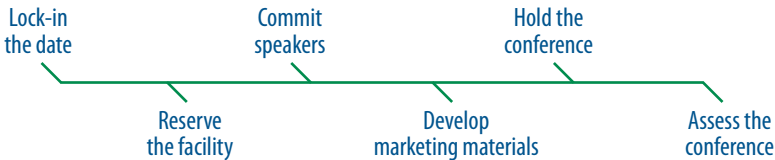
## Smart Timeline –

### Prepare a working timeline.

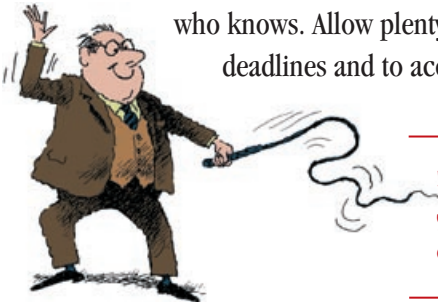
There's no standard amount of time for planning a conference, but begin early to ensure success.

Start making the arrangements at least a year before the date of the conference, and even earlier for a more complicated program with many speakers and events to coordinate.

Several factors will affect your planning. Often it's the availability of the facility that determines when the conference can be held. But other factors, such as when your speakers and audience are available, will also affect your conference date selection.



Be flexible with dates at first. It can save you money when working with hotels. Once you've set the date, work backwards from it to establish deadlines for reserving speakers and facilities, preparing and distributing marketing materials, and assembling conference packets. If you're not sure how long a particular task will take, get advice from someone who knows. Allow plenty of time at each stage to meet the deadlines and to accommodate unexpected delays.



**Lock in your dates, stick to your deadline, and plan ahead. Give yourself time to prepare.**

## Smart Budget –

### Determine your expenses and resources.

Hosting a conference can be expensive. Early in the process, determine your budget by estimating expenses. Don't forget to allow leeway for unexpected costs. Possible expenses might include:

- Cost of facilities
- Promotional materials and mailing expenses
- Fees for planning or marketing assistance
- Food, beverage, and entertainment costs
- Web site hosting and maintenance
- Equipment purchase or rental
- Support materials and supplies
- Travel and transportation
- Speaker fees and expenses
- Lodging costs for committee



Facilities, speakers, and marketing are the major expenses. For the facilities, consider which ones are appropriate for your audience, and compare estimated expenses, including the transportation costs. If you purchase food and beverages, the facility may waive the rental fee. For marketing, consult with your design team to estimate prices for design and layout, printing, postage, and any advertising. For every potential expense, try to prepare accurate estimates that include all fees and services.

In addition to estimating your expenses, you'll need to assess the resources that you'll use to meet those expenses. Include possible revenue opportunities, such as registration fees, event sponsorship, advertising, and sales.

## Smart Committees – Delegate responsibilities.

It may only take a few people to organize a small conference, but a larger conference will probably require a coordinated effort by many people. A smart planner will put together a good team and provide strong leadership.

Form task-oriented committees to address specific conference preparations, and establish one person to facilitate the committees' efforts and to promote good communication among all members.

Some of the tasks your committee will need to address include:

- Program development
- Speaker choices
- Budgeting
- Marketing and promotion
- Registration
- Support materials and supplies
- Facilities, food, and beverages
- Vendor/sponsor arrangements
- Lodging and transportation
- Off-site tours/trips
- Post-conference follow-up



Try to distribute the work evenly among the committees or persons involved. For larger events, you might need to subdivide some areas in order to balance the workload.

## Smart Facilities —

### Choose the right location.

Select a location that is easily accessible to the audience and/or one that offers unique qualities. Work with the sales manager of the facility to verify availability. Remember, you'll need to confirm the location before producing marketing materials. You may want to visit the site before you make your final decision. When you're thinking about a location, there are several factors that should be considered before finalizing your plans or signing a contract.

- Is there enough space to accommodate the number of expected participants?
- Can concurrent sessions and meetings be held, if needed?
- Is it accessible to those with special needs?
- Will the facility provide signs, tables, chairs, podiums, or audiovisual equipment?
- Can the staff provide a hospitality area and refreshments?
- Does the facility have banquet capabilities, if needed?
- Is ample parking available?
- Is it convenient to transportation, lodging, restaurants, and other attractions?
- Are tours or related educational opportunities available near the facility?
- Does the expense fit within your budget?
- Does it fit your organizational image?



## Smart Communication —

Create marketing and support materials.

### Marketing Plan

Publicity is crucial to the success of a conference. You may have an excellent program, but if the publicity falls short, the results can hurt your attendance. Promoting your event takes creative thinking balanced with practicality. If you are planning a regional, national, or international conference, contact Purdue Conference Division.



If you are developing a Purdue Extension Conference, Ag Comm will help you publicize, market, and promote your conference.

Don't underestimate the time required to design and print effective marketing materials. Producing high-quality marketing materials involves many stages: writing the text, editing the text, creating the layout, proofreading, obtaining printing bids, reviewing printer's proofs, printing, and mailing and distribution. Meet with your communication team at least eight months before your conference date. Be prepared to discuss questions about your audience, budget, and distribution preferences.

### Common Marketing Approaches

- Brochure/Mailer — This may be your primary form of promotion. State the title, purpose, and target audience of the conference. Be sure to include key dates, location, a basic agenda, keynote speakers, sessions, and expenses. Provide a Web site address, if available. Include a registration form or provide clear directions for how to register. If the brochure is to be mailed, will it require an envelope or be a self-mailer? This decision will affect design and expenses. On-line registration eliminates mailing and postage expenses.

- **Postcard** — Also known as a “save-the-date” card. Postcards should be distributed as early as possible to allow potential attendees to mark their calendars. Postcards should include the conference date, location, conference objective, and how to get more information. A postcard can direct recipients to a Web site for more information.

- **Web site** — Web sites are a useful promotion tool, but you’ll need to consider the expense, effort, and maintenance required. Does the conference merit a Web site?

Will your audience be able to access it? If so, make sure the site is live. Use it for updates, conference registration, and links to lodging, maps, and a downloadable schedule of events. If your conference will have



a Web presence, use your promotional materials to direct people to the site. The Purdue Conference Division has a full-service on-line registration system.

- **Print advertising** — Advertisements can be placed in newspapers, publications, or even at other conferences. A basic ad can be generated from your existing brochure and can be used to direct people to a contact person or your Web site for more details. Posters provide an eye-catching and informative method of attracting attention to your conference. They work best at events and locations where the target audience is expected to visit. Press releases can be directed at media outlets or organizations that might reach your target audience.
- **Cross-marketing** — Marketing with other events can extend the reach of your publicity efforts. Use newsletters and trade

journals to get the word out. In addition, use peers and similar conferences to cross-market your conference.

Before using any of these methods, consider your budget and the potential payoff involved.

**There's nothing worse than printing a thousand brochures with an incorrect date. Make sure all the information is accurate, and always have at least two people proofread your materials.**



## Support Materials

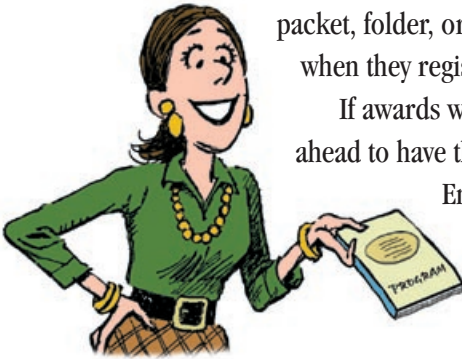
Discuss your need for support materials with your design team when you plan your marketing campaign. Ask about coordinating the overall design of the promotion and support materials. Remember, these materials must be written, edited, designed, printed, and delivered before the conference, so confirm event details as soon as possible. Providing accurate information about session topics, speakers' names, titles, presentation times, locations, and outside events is crucial. Don't use "To Be Announced" in the final materials. Ask about deadlines, then allow extra time to avoid any pitfalls.

Support materials may include the following:

- Registration forms
- Name tags
- Conference program, including schedule of events and locations
- Speaker presentation handouts
- Maps and visitor guides

- Vendor/sponsor promotional items
- Exhibitor agreement forms
- Event tickets and coupons
- Signage
- Evaluation forms

These materials could be organized in a conference packet, folder, or bag and distributed to attendees when they register.



If awards will be given at the conference, plan ahead to have the appropriate items on hand.

Engraving or personalization might be required for plaques, trophies, certificates of recognition, and other mementos.

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**You cannot  
over plan a  
conference.**

**Success  
is based  
on good  
planning.**

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## Smart Conference — Hold your conference.

The conference date has arrived. Remember that once the conference begins, planning is over. You become a problem solver and trouble-shooter. It's best to compile a thorough to-do list ahead of time, and delegate responsibilities for the various tasks.

- Registration — staffing for registration and information
- Support materials — packet with name tag, conference program, schedule, maps, coupons, and sponsors' items
- Hospitality — refreshments and hospitality area
- Facilities — signs, tables, chairs, podiums, heating/cooling issues, and accommodation concerns
- Hosts — for speakers, special guests, special sessions, and events
- Sessions — moderators and evaluations
- Equipment — computers, audiovisual equipment, and presentation needs
- Banquets/awards — time, place, service, and meal arrangements, including accommodations for special requests
- Vendors — location, hours, and equipment needs
- Tours — location, time, and transportation



Remember to expect the unexpected, and be flexible. Have extra help organized ahead of time, and know whom to contact in case something is needed. Be sure to use and collect the session/speaker evaluations. They will help you see what worked and what didn't for future conferences.

## Smart Post-Conference —

Assess the conference.

During your conference, ask attendees to evaluate each session.

### Session evaluations (completed by attendees)

- Did the session meet your goals or expectations?
- Was the content beneficial?
- Were the accommodations comfortable?
- What would you like to see in the future?
- How did you learn about the conference?



After the conference is over, take time to evaluate it while the details are still fresh. Review the sessions, attendance, overall conference, and the planning.

### Conference evaluation (completed by planning committees)

- Did the conference meet your goals or expectations?
- What areas needed improvement?
- Was the conference well attended?
- Given all that went into staging the conference, was it worth doing?
- Did the conference stay within its budget?

- Were the preparations comprehensive and effective?
- Was the timeline followed?
- What is the cost of not having a conference?
- What changes will be needed for future events?

Shortly after the conference, schedule a follow-up meeting with your planning committees to evaluate the outcome. Be sure to send thank-you notes to the presenters and all who helped. Finish any financial business, and complete a final budget report. Keep accurate notes throughout the process for future event planning.

**Be sure to give yourself  
a pat on the back!**



## Resources

Purdue University Conference Division offers a wide range of professional services for conferences of all sizes and purposes. A professional conference coordinator manages many of the details discussed in this booklet for you. The Web sites below offer help and suggestions in planning a conference.

- Purdue Conference Division:  
[www.conf.purdue.edu](http://www.conf.purdue.edu)  
Sales office: 800-956-6385  
Stewart Center 116, Purdue University
- Indiana Chapter of Meeting Professionals International:  
[www.mpi-indiana.org](http://www.mpi-indiana.org)
- Indiana Meeting Planners Guide:  
<http://indianabusiness.com/meeting>



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