

Conference Guidebook

CONFERENCE : _____ **DATE :** _____

You have decided to host a conference! Now what? This guidebook will help you navigate planning, discovery and execution for a successful, world-class conference. Of course, the earlier you can start working on your conference, the better!

Below is a list of high-level milestones that the guidebook will outline it more in detail:

- ☐ Establish conference goals and outcomes.
- ☐ Select preferred dates and location for the conference.
- ☐ Meet with Katherine Banner to develop a conference master plan: purpose, objectives, outcomes, expectations, call to action and how the conference builds off the Leadership Summit.
- ☐ Meet with Elizabeth McDonald to arrange logistics: venue, food and beverage, entertainment and travel.
- ☐ Create a budget.
- ☐ Arrange for any speakers/vendors or third-party attendees.
- ☐ Brand your conference and begin communication with attendees.
- ☐ Manage conference set up and execution.

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HBG Conference Checklist

Phase 1: Discovery

☐ Establish conference goals and outcomes

Make it easy to gauge conference success

- What are your outcomes?
- How do you want attendees to Feel?
- What would you like them to Know?
- What would you like them to Do during and after the conference?
- How does this conference build on the 1HBG Leadership Summit?
- What will be different a year from now as a result of this conference?

☐ Identify how many attendees to invite

☐ Select the date (See Sally Mullins)

Check for conflicts with other events or holidays

☐ Identify venue and negotiate details

Work with Elizabeth to find a suitable venue

- Consider breakout sessions, capacity, dining and location.

☐ Estimate costs

- Room rental
- Food and beverage
- Meeting spaces
- Equipment
- Speaker fees
- Travel
- Swag
- Shuttle Services
- Insurance

☐ Create a budget

Based on the costs above, determine your budget and identify any necessary reductions

☐ Create a conference Master Plan

Work with Katherine Banner to develop

Phase 2: Design and Develop

☐ **Work with your team**

Select team of stakeholders and decision makers for planning and executing

☐ **Brand your conference (Optional)**

Work with Stacey Walters to develop a logo, color palette and tagline as needed

☐ **Build HBG Conference Website (Optional)**

Work with HannahKate Gough to build out a page on the HBG Conference website for attendees. Visit www.hbgconferences.com

Website content to include:

- Agenda, logistics and additional details
- Venue and travel information

☐ **Create and launch Communication Plan**

Ensure that attendee list has been confirmed

- Produce save the dates, invitations, etc.
- Update conference page on the HBG Conference website
- Enable/create email notifications

☐ **Identify and confirm speakers/presenters/ vendors/entertainers**

- Finalize presentation/speech topics
- Acquire bio information, photos
- Sign contracts, if applicable

☐ **Develop agenda**

Work with Katherine Banner to develop

☐ **Venue and logistics planning**

Work with Elizabeth McDonald on menus, room lists, space needs, signage, etc.

☐ **Order any desired swag**

Work with HannahKate Gough to place orders

Touch base with presenters/speakers regarding:

- Copies presentations

Continue executing Communication Plan:

- Update and add details to conference page on the HBG Conference website

Finalize and proofread print and digital materials.

Phase 3: Implement

- ☐ **Finalize scripts.**
 - Assign practice sessions for speakers and facilitators.
- ☐ **Brief hosts/support team members on duties and timelines.**
- ☐ **Finalize seating plan. (Optional)**
- ☐ **Make print and online copies of speeches, videos, and presentations as needed. (Optional)**
- ☐ **Do a final attendee check, including name badges & attendee list.**
- ☐ **Ensure print and digital signage is in place.**
- ☐ **Prepare registration tables.**
 - Stock necessary items (blank name badges, paper, pens, tape, stapler, etc.)
 - Ensure there are enough outlets. Consider power strips for attendees and team.
- ☐ **Ensure swag is on-site.**
- ☐ **Test all A/V equipment.**

Phase 4: Evaluate

Send out survey to participants

Work Conference Team to build post-conference survey.

- Provide to participants the last day of the conference.

Review Survey Insights

Debrief with Conference Planning Team