Your Event Planning Checklist

Tasked with planning a meeting, but don’t know where to start? Westin is here to help. Whatever stage of the process you’re in, our downloadable, printable checklist can help you stay on track.*

Initial Steps

It’s important to have key aspects of your meeting or event defined before beginning the request for proposal (RFP) process. The more detailed your RFP, the more relevant the proposal from the hotel will be, and the more helpful your Westin sales representative can be in designing an event that meets your needs.

- Determine what your basic meeting requirements are, including dates, location and number of attendees.
  Tip: If you have flexibility with your dates, let the hotel know in your RFP. Hosting your meeting during a hotel’s slow period can help lower the cost.

- Estimate how many attendees will need guest rooms during your meeting and how many attendees you will have overall. The more guest rooms you require, the more negotiating power you’ll have when it comes to your final contract.
  Tip: Consider upgrading the experience for your VIP attendees by booking premium room or suite. Ask your hotel representative for more information.

- Define the nature of your meeting and its objectives.
  Is it a networking event? A training? A brainstorming or ideation session? A celebration or promotion? Having clarity about the purpose of your event will help ensure that your sales representative’s recommendations are well aligned with your needs.

- Draft a preliminary agenda. This will help you think through your needs for meeting rooms, food and beverage, and entertainment.

- Set a budget and think through what it will cover versus what attendees will be responsible for covering themselves.
Selecting a Venue

☐ Research and compare venues to determine which best fit your needs. Is it important to be close to a city center office? Or the airport? Is it important that the venues have a variety of recreational offerings, such as golf, spa services or a pool?
Tip: Although an in-person visit is way to get a feel for a hotel, some of our hotel websites offer tools that allow you to take a virtual tour of the property and explore the facilities through interactive maps and floor plans.

☐ Submit RFPs to hotels that best fit your meeting needs.

☐ Select a venue for your meeting.

☐ Negotiate and finalize your contract terms. (Refer to our Overview of Costs guide for information on the fees you can expect to pay, and to our Event Planning Glossary for definitions of some commonly used contractual terms.)
Tip: Did you know that you can earn Starpoints for meetings and events you host at a Westin hotel or resort? Just provide your SPG number to your Westin sales representative.

At Least Three Months Out

☐ Send a “save the date” invitation to attendees.

☐ Finalize your meeting agenda.

☐ Arrange group transportation, if necessary.
Tip: A destination management company (DMC) can be a great resource when planning event logistics. If you’d like extra support arranging group transportation or off-site entertainment or activities, your hotel representative can provide the name and contact information of a recommended DMC.

☐ Book speakers or entertainment, if required.
Tip: Your Westin hotel contact can be a great resource for planning on-site specialty events for your meeting. This can be a good way to facilitate team building or networking without the hassle and cost of off-site transportation.

☐ Place an order for any printed materials you might need (e.g., custom signage).

☐ Begin production of meeting content (e.g., videos, presentations, printed collateral and worksheets).

☐ Order amenities or gifts for VIPs and other attendees. The hotel can help prepare and deliver amenities to your attendees, so ask your representative.

☐ Set up a master account with the hotel for meeting charges.

☐ Create a customized event website. When you book your meeting at a Westin hotel, you get complimentary access to StarGroups, allowing you to create a custom website for your event. Your StarGroups template includes a unique URL and lets you add logos, images and information about your event, including transportation and destination details, documents for attendees to download and a guest room booking tool.

☐ Send invitations to attendees. Include the link to your custom event website, and provide a way for attendees to notify you about dietary needs and other special requests.

☐ Decide on publicity, PR and social media strategy for your event, if needed.
At Least One Month Out

- Begin menu planning with your hotel representative. (See our guide on Planning the Perfect Menu for more information.)
- Finalize room setups and A/V needs.
- Determine your needs and place an order for room decor (e.g., florals/botanicals, special linens, special furniture).
- If using hotel guest rooms, send your rooming list to the hotel or check the booking status via your StarGroups custom reporting tool. Notify the hotel of any VIPs who will be attending your event.
- Check in with speakers, facilitators and any vendors to ensure that their content development is on track.
- Send a reminder to attendees with event information, including an agenda, transportation details and other event instructions (e.g., appropriate attire).
- Confirm shipment of any pre-ordered amenities or custom signage to hotel.
- Assemble registration kits for attendees. They should include agendas, name badges, vouchers, leisure activity suggestions, etc.
  Tip: Westin Hotels & Resorts now provide planners with a customizable app for their meeting, allowing attendees to go paperless and view real-time content like event agendas, speaker bios and property information right from their device. Ask your hotel representative for more information.

One Week Out

- Confirm final food and beverage counts with the hotel.
- Have a call with your hotel team to walk through a detailed daily agenda of meeting needs and requirements.
- Finalize your meeting presentation materials.
- Share presentations or videos with the hotel A/V team in advance.
  Tip: Bring a printed copy of all meeting materials as a backup. That way you can make photocopies, if necessary.
- Confirm that all shipments have arrived at the hotel.
- Release any publicity around your event to key stakeholders or the media.

On-Site for Event

- Meet with the hotel team to review BEOs/all event details.
- Confirm your on-site contact with the hotel.
- Do a walk-through of all meeting spaces and VIP rooms.
- Check to ensure that all times and locations for your function have been posted correctly, clearly and visibly.
- Do a test run of all A/V presentations.
- Set up registration kits for attendees.
- Greet attendees and VIPs as they arrive at the hotel.
- Sign daily banquet orders as required.
Post-Event

☐ Organize shipping of any equipment that needs to be returned.

☐ Review your master bill to ensure that all charges posted correctly. With eBill, you can access your master bill online from any location for up to 90 days after your event, and you can settle it directly through the secure site.

☐ Write thank you notes to speakers, staff and others, as appropriate.

☐ Solicit feedback from attendees and key stakeholders.

☐ Provide detailed feedback to hotel. Complete any post-meeting surveys. Make sure to recognize any hotel associates who provided exceptional service.

☐ Keep a set of notes about what worked well and what didn’t, so you can refer to it when planning future events.

Take a well-earned rest!

*Please keep in mind that every meeting is different, and while the checklist above should serve as a good general guide, it may not cover all of your event needs.