



Educational Programming: Conference, Meeting and Event Planning Process

The abbreviated planning grid below gives you a quick overview of the process and timeline for a properly executed event.

<p>Phase 1: Initial Meeting and Event Consultation</p> <ul style="list-style-type: none"> - Meeting between Activity Director and Educational Programming Manger - Review 7-Phase Activity Planning Process - Review previous conference budget and pros/cons, <i>if applicable</i> - Discuss and reserve potential dates, location - Review CME requirements and deadlines 	<p>10-12 Months Prior to Activity</p>
<p>Phase 2: CME Application and Development</p> <ul style="list-style-type: none"> - Activity Director to begin planning activity Topics/theme/speakers - Once Agenda is drafted, and keynote speaker(s) confirmed, begin completing the CME Application - Establish Planning Timeline with Grant Deadlines (IIE) - Decide on Commercial Support Companies/Pharmaceutical Reps, <i>if applicable</i> - Submit, Review, Revise CME Application and Planner/Presenter and Disclosure Forms with the Certification Team until all required documents are submitted and approved 	<p>8-10 Months Prior to Activity</p>
<p>Phase 3: Activity Approval and Launch</p> <ul style="list-style-type: none"> - Finalize the approval of the CME application (6 months) - Send Estimate Program Budget to Activity Director for Review & Approval - Sign and Return Fiscal/Certification Letter from Activity Director - Discuss targeted companies and relevant grant components with Grant Coordinator, grant research to begin - Assign Educational Event Coordinator (IIE) 	<p>6-8 Months Prior to Activity</p>
<p>Phase 4: Commercial Support & Marketing Planning</p> <ul style="list-style-type: none"> - Grant Coordinator to begin submitting grant applications (6 months) - Develop Marketing/promotional Strategy (IIE) - Begin content development and layout for direct marketing collateral - Plan and reserve catering, media, furniture, etc. - Begin any external speaker travel and hotel needs - Approve and print direct marketing collateral 	<p>5-6 Months Prior to Activity</p>



<p>Phase 5:</p> <ul style="list-style-type: none"> - Build and open registration website, ideally 4 months prior to event - Grants Coordinator to notify Edu. Activity coordinator when grants are received - Educational Coordinators to update website and conference materials with current commercial support and certification information - Send email invitations to intended audience - Internal PR/Affiliates, Social Media - Send email invitation to Exhibitor database, 250+ names - Collect all speaker/faculty forms 	<p>3-4 Months Prior to Activity</p>
<p>Phase 6: Course Delivery</p> <ul style="list-style-type: none"> - Create syllabus, if needed - Review/modify presentations for ACCME rules; Print and upload Presentations - Finalize catering numbers, room layouts, etc. - Review on-site staff support - Certification team to prepare post-event evaluation 	<p>1 month prior to Activity</p>
<p>Phase 7: Post Activity</p> <ul style="list-style-type: none"> - Process expenses and Speaker Reimbursement/Honorarium - Provide Financial Summary & Evaluation Summary - Meet with Activity Directors(s) to debrief, review <i>Post-event Program Summary</i> - Email 3-month evaluation to participants - Grant Coordinator completes and submits grants reports 	<p>1-3 months post-Activity</p>