



EVENTS PLANNING GUIDE

Last updated: March 2021

Pre-planning meeting

Cross team meeting to introduce proposed in-person or virtual event and/or live course, identify available dates & potential hosting platforms.

Event requester to send meeting invite and complete [event planning brief template](#) 2-3 business days prior to pre-planning meeting.

Meeting will include:

- Meetings & Events
- AIAU
- B&E
- TSS
- Product Strategy

The above team will review the event brief and share recommendations with requester 3-5 business days after the pre-planning meeting.

Next steps:

Event requester to submit [event planning form](#)

Planning meeting

Cross team meeting with core team to discuss event planning & process, set expectations & deadlines, identify responsibilities &

tasks, discuss IT & CE requirements, set up WorkFront request and share [Meetings template](#).

Meeting should include:

- Meetings & Events
- Assigned B&E account manager
- AIAU

Next steps:

1. Requester to open job in WorkFront
2. Requester to submit CE request form to [Stephen Martin](#) 10 days prior to marketing (title, description, learning objectives required)
3. Meetings & account manager to develop timeline

Additional event planning resources:

[Meeting resources](#)

[Virtual event speaker best practices & tips](#)

[AIA.org calendar template](#)

[CES guidelines](#)