



Diversified Management Services

CONFERENCE AND MARKETING MANAGEMENT SERVICES CHECKLIST

The following is a list of possible conference, special event and marketing management services which can be provided by Diversified Management Services, LLC (DMS). Potential clients are invited to review this list, identify those services which should be included in a proposal, and add any others which may be particular to their project.

Please return this form to: Diane Drago
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ADMINISTRATIVE SERVICES

- Overall coordinator/manager of event—all information is centralized in DMS office
- Attend planning meetings with client
- Prepare and distribute meeting minutes
- Prepare event timeline
- Liaison to committee members

FINANCIAL SERVICES

- Research and prepare project budget
- Set up and oversee bank account (if appropriate)
- Receive and process all payments
- Maintain accounting database (Reports are issued to client on schedule to be determined.)
- Oversee budget (receipts and expenditures)
- Issue invoices
- Pay or request payment of invoices

PROGRAM DEVELOPMENT SERVICES--SPEAKERS

- Assist client with development of agenda/program, including suggesting speakers and flow/timing of program
- Prepare letters of invitation and/or confirmation for speakers
- Liaison with speakers and performers throughout project
- Obtain materials from speakers—CVs, audiovisual requirements, background materials, objectives, handouts
- Work with speakers to arrange travel and lodging
- Prepare and distribute thank you letters and payment of honoraria and expenses



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SPECIAL EVENT SERVICES

- Work with client to develop special event and/or entertainment options
- Liaison with potential vendors and/or entertainers to implement the goals of the special event
- Work with travel agencies, transportation vendors and/or other appropriate vendors necessary to the special event

EDUCATION CREDITS

- Research procedures for appropriate continuing education credit applications
- Obtain necessary paperwork to submit application
- Write and submit application
- Follow up services required to complete application process

MARKETING SERVICES

- Develop marketing plan with client
- Work with client to identify potential audience and how to reach them
- Collect/organize mailing lists
- Research competitive bids for design and printing services
- Draft and edit text for marketing/registration materials
- Work with/oversee graphic designer, printer, and/or mailing service
- Distribute marketing materials (DMS staff or mailing service)
- Identify other marketing/publicity venues and assist client with distributing information to them (newsletters, associations, PSAs, placement of articles/announcements, etc.)

SPONSOR AND EXHIBITOR SERVICES

- Assist client with development of marketing plan
- Assist in identification of potential sponsors and exhibitors
- Prepare and distribute solicitation materials
- Prepare and process educational grants, including on-line
- Process sponsor and exhibitor commitments—prepare and distribute confirmation materials
- Obtain information necessary for program acknowledgments or other special considerations
- Liaison/point of contact to sponsors and exhibitors throughout project
- Prepare and distribute thank you letters and invoices



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VENDORS

- Research/obtain bids from appropriate vendors such as graphic designer, printer, mailing service, entertainers, transportation services, florists, entertainers, etc.
- Research, obtain bids, and arrange for amenities (tote bags, portfolios, gifts)
- Liaison to vendors throughout project
- Identify vendors for and assist in development of social programs in conjunction with the event
- Assist client with arrangements for and production of special services related to event such as broadcasting of event, press relations, etc.

FACILITY SERVICES

- Research/visit potential facilities/sites for event
- Negotiate facility contract (Client must always approve and sign contracts.)
- Liaison to facility throughout project, including on-site.
- Oversee room set-up and audiovisual requirements
- Oversee catering selections and guarantees
- Oversight of master account—lodging arrangements for speakers and staff

REGISTRATION SERVICES

- Receive and process registrations and payments
- Create, develop and maintain registration database (online and/or traditional)
- Prepare and send confirmations to registrants
- Liaison/point of contact with registrants throughout the project
- Develop and maintain online registration system

ON-SITE SERVICES

- Draft/prepare, edit, and oversee production of program book and materials
- Prepare name tags
- Organize and assemble materials and amenities to distribute on-site
- Organize and staff registration desk
- Liaison with facility, speakers, exhibitors, sponsors and special vendors

POST-EVENT SERVICES

- Review invoices
- Pay invoices (if appropriate)
- Issue invoices for outstanding accounts
- Prepare and distribute thank you letters
- Prepare final report for client



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OTHER SERVICES

If there are other services required for this project, please describe them.

POTENTIAL CLIENT INFORMATION:

To the extent this information is available, please complete the following:

POTENTIAL CLIENT

EVENT TITLE

EVENT DATE(s)

PREFERRED LOCATION

PROJECTED ATTENDANCE