

EVENT PLANNING

Deadline and Prep Checklist
September 19 - 22

Task	Lead time	Deadline	Description	Status
Pre-Planning				
Add to FY DFS Calendar	6 months			Complete
HW Attendees	4 months			In progress
Upload to sharepoint				Not Sarterd
File Set up	4 months			Not Sarterd
Conf Deadline Checklist	4 months			Not Sarterd
Preliminary Hotel & Conf Sched	3.5 months			Not Sarterd
Team Leader	4 months			Not Sarterd
Schedule Kickoff Meeting	4 months		6/28 @ 1:00	Not Sarterd
Schedule: Creative Meeting	4 months		6/30 @ 2:00	Not Sarterd
Establish Outbound Shipping Date	4 months			Not Sarterd
Email: Preliminary Hotel & Conf Sched	3 months			Not Sarterd
Hold Kickoff Meeting	3 months		6/28 @ 1:00pm - Teton	Not Sarterd
Conference				
Conference Contract				Not Sarterd
Payment/Deposit				Not Sarterd
Register Staff				Not Sarterd
Booth				Not Sarterd
Attendee list available?				Not Sarterd
Exhibit Hours	3 months			Not Sarterd
Set-up/Breakdown Hours	3 months			Not Sarterd
Balance of Payment Due	3 months			Not Sarterd
Booth/Banner/Poster Display, Conference Message & Tools Designation				
Booth Display Set Up			Booth? Panel? Banner? Poster	Not Sarterd
Key Messages			In kick off meeting	Not Sarterd
Collateral Selection			In kick off meeting	Not Sarterd
Promotional Items			In kick off meeting	Not Sarterd
Tools & Books order	2 months		In kick off meeting	Not Sarterd
Planning				
Hold: Creative Meeting			6/30 @ 2:00	Not Sarterd
Schedule: Logistics Meeting	1 month		For 2 weeks prior to conference	Not Sarterd
Notify Shipping Company	3 weeks			Not Sarterd
Finalize Shipping date/time	1 weeks		Contact Seko. Pick up 9 days prior to conf	Not Sarterd
Marketing				
Direct Mail:				Not Sarterd
Direct Mail:				Not Sarterd

Task	Lead time	Deadline	Description	Status
Email Outreach:				Not Sartet
Email Outreach:				Not Sartet
Submit Co Description				Not Sartet
Submit Logo	3 months			Not Sartet
Conference Advertising:				Not Sartet
Conference Advertising:				Not Sartet
Landing Page Planning	2 months			Not Sartet
Rotator Image Planning	2 months			Not Sartet
Landing Page Live Date	1 month			Not Sartet
Rotator Image Live Date	1 month			Not Sartet
Booth Design & Services				
Floor plan	2 months			Not Sartet
Furniture Selection			Exhibitor kit to arrive in August	Not Sartet
Booth Display/Layout/Requirements				Not Sartet
Electrical position				Not Sartet
Internet position				Not Sartet
Booth Services & Orders				
Internet Order	1 month			Not Sartet
Electrical Order	1 month			Not Sartet
Services & Furnishings Order	1 month		Cleaning, Furniture, Carpet	Not Sartet
Furnishings Order	1 month			Not Sartet
Material Handling Request	1 month			Not Sartet
Final Prep				
Email: Logistics Overview	2 weeks			Not Sartet
Hold: Logistics Meeting	1.5 weeks			Not Sartet
Demo labels	1.5 weeks			Not Sartet
Prepare Info Pkt	1.5 weeks			Not Sartet
Prepare Shipping Labels	1.5 weeks		outbound/inbound labels	Not Sartet
Print Collateral	1.5 weeks			Not Sartet
Print Collateral Display Cardstock	1.5 weeks			Not Sartet
Pack Shipment	1.3 weeks			Not Sartet
Shipment Pick up	1.25 weeks			Not Sartet
Email: Paperwork to lead	0.75 weeks			Not Sartet
Post Show				
Final Invoices in Binder	2 weeks	10/3/2011		Not Sartet
FY11 Budget - enter final costs	2 weeks	10/3/2011		Not Sartet
Submit Visa Expense Report	4 weeks	10/17/2011		Not Sartet
Check in & Unpack Shipment	4 weeks	10/17/2011		Not Sartet

EVENT PLANNING

Preliminary Hotel & Conference Schedule
September 19 - 22

Conference Location	Campus • Facility: Hall 1 • Exhibit Area: Observation Deck
Registration / Important Info	All attendees must complete an Individual Exhibitor Agreement Form & register individually. Details regarding individual registration will be sent w/ the service packet. Please read the Exhibitor Agreement in the Prospectus which includes <i>important terms</i> regarding use of customer contacts ==>
No Appointment Zone	Co Agreement: "... neither I nor my company will extend invitations for any customer activities, such as dinners, appointments, private meetings or receptions with customers and their staff on Monday, September 19 before 7 p.m. or Tuesday, September 20 nor during any educational sessions or the Executive Address and Cool Stuff Ahead sessions."
Conf. Website	sample link
LinkedIn	sample link
Booth	Location: #404 10' x 10'
Move-In Hours	September 20 8:00 a.m. – 12:30 p.m. - All crates must be off the show floor by noon.
Exhibit Hours	September 20 Exhibits Open – 12:45 - 5:00 p.m. September 20 Exhibits Open – 10:00 a.m. – 1:45 p.m.; 2:45 – 5:30 p.m.
Move-Out Hours	September 21 Teardown – 6:00 – 9:00 p.m. - MUST BE COMPLETE BY 9:00 p.m.
General Badges	• Lead • Co-lead • Access: meals, exhibit hall, Executive address, Cool Stuff Ahead, education sessions. • No Access: focus groups, forums, receptions, or advisory councils.
Conference Preferred Hotel	• Co requests that you do not book your travel until each registrant is approved subsequent to online registration • Co does not have a single designated preferred hotel. Their website hotel link will provide many options for you to choose from.
Hotel Website	sample link
Hotel Website	sample link
Alternative Hotels	sample link

EVENT PLANNING

Logistics & Overview

September 19 - 22

CONFERENCE OVERVIEW	
Key Message	1. A "1, 2 punch" of consistent, connected information already embedded in MyChart. 2. The specific, patient education resources for all your care settings. 3. The rewards of MU requirements and other satisfaction scores.
CONFERENCE LOGISTICS	
Conference Focus	Co-ready: PI's, KB, callout multi-languages
Conference Location	Campus • Facility: Hall 1 • Exhibit Area: Observation Deck
Conference Website	sample link
Exhibit Map	sample link
Booth	Location: #404 10' x 10'
Registration / Important Info	All attendees must complete an Individual Exhibitor Agreement Form & register individually. Details regarding registration will be sent w/ the service packet. Please read the Exhibitor Agreement in the Prospectus which includes important terms regarding use of customer contacts ==>
No Appointment Zone	Co Agreement: "... neither I nor my company will extend invitations for any customer activities, such as dinners, appointments, private meetings or receptions with customers and their staff on Monday, September 19 before 7 p.m. or Tuesday, September 20 nor during any educational sessions or the Executive Address and Cool Stuff Ahead sessions."
Conference Preferred Hotel	• Co requests that you do not book your travel until each registrant is approved subsequent to online registration • Co does not have a single designated preferred hotel. Their website hotel link will provide many options for you to choose from.
Healthwise Team	<u>LIMIT 2 Badges per vendor</u> •Lead
Move-In Hours	September 20 8:00 a.m. – 12:30 p.m. - All crates must be off the show floor by noon.
Exhibit Hours	September 20 Exhibits Open – 12:45 - 5:00 p.m. September 20 Exhibits Open – 10:00 a.m. – 1:45 p.m.; 2:45 – 5:30 p.m.
Move-Out Hours	September 21 Teardown – 6:00 – 9:00 p.m. - MUST BE COMPLETE BY 9:00 p.m.
Return Shipping Instructions	TBD
BOOTH & MESSAGING	

EVENT PLANNING

Logistics & Overview

Booth Set Up & Display	• Side & back draping • (1) 8' skirted table	• (2) side chairs • Wastebasket
HW Set Up & Display	• Booth panel TBD • General msg banner stand	• Utilize Conf table w/ tablecloth • Reps to use notepads for demo
Demo	Minimal Folio	

MARKETING

By Conference	<u>Del Date</u> TBD	<u>Delivery</u>	<u>Message / Recipients</u>
Email & Direct	<u>Del Date</u> 8/19 TBD	<u>Delivery</u> COMM Blast AE's forward	<u>Message / Recipients</u> HTML to HW contacts

ADVERTISING

Advertising	<u>Date</u> TBD	<u>Medium</u> His Talks Google Ads Fierce LinkedIn? Twitter Posts?	<u>Message</u>
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WEB

Landing Page	x Landing page		
	<u>Live Date</u> 8/19/2020	<u>Call to Action</u>	
URL	x Rotator Image x Events page		

SALES RESOURCES

Signature	* landing page		
Collateral	<u>Qty</u>	<u>Product</u> Co-ready datasheet & collateral Multi-fold handout to be developed	
Promotional Items	<u>Qty</u>	<u>Item</u> Pedometers Monitor cloths Pens	
Tools & Books	<u>Qty</u>	<u>Item</u> Books Demo labels	

EVENT PLANNING

Deliverables Summary

FINAL DELIVERY DATES/GENERAL INFO see individual sections other deadlines				
Booth Panel	In Progress		Landing Page	In Progress
Banner Stand	In Progress		LinkedIn	Not Sarterd
Other Display	Not Sarterd		Twitter	Not Sarterd
Demo	Not Sarterd		.org Events	Not Sarterd
Co Description	In Progress		Rotator	Not Sarterd
Conference Postcard	Not Sarterd		Press	Not Sarterd
Conference Email	Not Sarterd		Collateral Dev	In Progress
Direct Mail	Not Sarterd		Collateral Update	In Progress
Email HTML	In Progress		Promo Item	Not Sarterd
Post-Email HTML	Not Sarterd		Signature	Complete
Advertising - His Talks	In Progress		Invitation	In Progress
Shipment Leaves HW	In Progress		Other	Not Sarterd
Attendee List Available	Complete			
Booth				
Booth Panel	1 panel of booth: specific			
Deadlines	Final product:	File To Printer:		
Team	Fran, UE, Lauren			
Message/Call to Action	Co-ready - come full circle.			
Specifications	Checking w/ printer to see if the files were altered and, if so, we can get them to work from.			
Print	Catapult 3			
Delivery				
Banner				
Banner Stand	General Messaging - create new fabric banner graphic to use in existing cannister			
Deadlines	Final due to PM:	File To Printer:		
Team	Fran, UE, Lauren			
Message/Call to Action	Co-ready			
Specifications	Viewing size = 33.4" w x 84.5"h Printing production size = 33.4" x 94.5h - 10 inches of blank space			
Print	Catapult 3			

EVENT PLANNING

Deliverables Summary

Delivery	Printer to deliver to COMM to ship to conference.	
Email		
Deadlines	Blast:	Forward:
Team	UE, Fran, Lauren, Linda	
Message/Call to Action	See Project Brief • Appointment outreach • 1-2-punch	
Recipients	Co contacts	
Format/Specs	• HTML • Leverage HIMSS?	
Delivery	• Linda - email blast • Forward	
Advertising		
Medium	His Talks	
Deadlines	Due to Advertiser:	Due to PM:
Team	Fran, UE, Lauren	
Message/Call to Action	See Project Brief	
Landing Page		
Deadlines	Live Date:	
Team	UE, Fran, Linda	
Message/Call to Action	See Project Brief	
Collateral Development		
Document	Multi-fold handout	
Deadlines	Final Product:	File to printer:
Team	UE, Fran	
Message/Call to Action	See project Brief: 1-2-punch	
Specs	• Per Liz - latest date for receipt is 8/26. Still have die from previous project. • If files need adjusting - cost for copy change. They can provide altered files for use.	
Print Timelines	• 2 days to receive proof from receipt of file • 2-4 days to get press time • up to 5 days drying time - depending on project	
Print	TVL	
Delivery	Handout at conference	
Collateral Updates		

EVENT PLANNING

Deliverables Summary

Document	Co-ready solutions	
Deadlines	Final Product:	
Team	Fran	
Invitation		
Document	Handout/insert invitation to event TBD	
Deadlines	Final Product:	File to printer:
Team	UE, Fran	
Message/Call to Action	See project Brief	
Delivery	Handout at conference	
Development Team		
Goals & Messaging	• Tad • Phyllis	•Fran
Administrator	• Lauren	
Copywriter	• Fran	
Designer	•	
List Mgt/ Emails	• Linda	• Sales
Web Programming	• Linda	• Kelly
Travel	• Attendees • Alicia	• Tanya
Review Team		

EVENT PLANNING

Contacts & Conference Specs

September 19 - 22

Conference

Main Contact

Phone:

Email

Fax:

Other Contact

Phone:

Email

Fax:

Vendors

Expo Contact

Phone:

Email

Fax:

Internet Contact

Phone:

Email

Fax:

Technical Contact

Phone:

Email

Fax:

Technical Requirements

Electrical

Internet

HUB/Router

Booth Requirements

Furniture

Carpet

Cleaning

Shipping

Seko Contact

Phone:

Email

Fax:

Instructions

PER CONFERENCE: Thursday, September 22, 2011 - Pickups can be scheduled but everything must be off the exhibit floor by 9:00 p.m. on Wednesday.

Site Shipping Address

Must ship to advance warehouse - deliveries to event will be refused

EVENT PLANNING

Conference & Registration

Badges	(2) general • Access: meals, exhibit hall, Executive address, Cool Stuff Ahead, education sessions. • No Access: focus groups, forums, receptions, or advisory councils.
Cost for Additional	
Special Instructions	All of your organizations' attendees must complete an Individual Exhibitor Agreement Form and register individually. Details regarding individual registration will be sent with the service packet (please do not book your travel until each registrant is approved subsequent to online registration).
Floor plan	
Conference Booth Set Up & Display	

Special Instructions

Notes	
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EVENT PLANNING

Shipping Checklist

September 19 - 22

Campus

- Facility: Hall 1
- Exhibit Area: Observation Deck

	Qty	Packed	Case #	Notes
Booth Setup				
Booth				
Bowl for Promo Items				
Flat Screen				
Monitor				
Monitor Mount				
New Provider Banner Stands				
Old Provider Banner Stands				
Drape and hooks				
Extension cords				
Power Strips				
Speakers				
Internet cable				
Keyboard				
Literature holder - tall				
Lights				
Laptop				
Mouse				
Mouse Pad				
Pen holder				
Podium - Skyline				
Trash Can / bags				
Books				
HWHB				
HW4L				
HWHB SP				
Supplies & Tools				
Band-Aids				
Book Ends				
Business Card Holders				
Cleaner				
Duct Tape				
Heavy box knife				
Ibuprofen				
Kleenex (2 large)				
Over the door coat rack				
Packing Tape				
Padlock				
Paper clips				
Pens / Markers				
Post-Its				
Ratchet for monitor stand				
Scissors				

Last Update: 6/10/2026

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Shipping Checklist

September 19 - 22

Stapler/Staples				
Step Stool				
Tape				
Velcro				
Visqueen				
Wet Wipes				
Zip Ties				
Promotional Items				
Lanyards				
Leather USBs				
Luggage tags				
Pedometers				
Pens -- Same as WHCC				
Starbucks Cards				
USBs				
Collateral				
Corporate Brochure				
Datasheet for Learn to Earn				
CM solution Data Sheet (new if ready)				
CM Solution - AHIP branded				
Jiva- per Randy's request				
Sample print guides				
Logistic Packet				
Display Stickers				
Floor Plan				
Presentation Flyer				
Conf Documents				
Copy of all service/furn orders				
Demo Labels				
Logistics Overview				
Booth Assembly Directions				
Packing Instructions				
Shipping Labels				
Shipping List				
Looping Demo on Master USB				
Podium Setup Instructions				
Shipping paperwork.				