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CONFERENCE-IN-A-BOX

Overview

These materials were created to help you and your team plan and execute financial wellness events for your employees, retirees, and families.

Pick and choose from this menu of materials and customize them to support you in planning and executing your in-person or virtual events.

These materials consist of:

- Logistical checklist(s) that includes items to consider as you put together the plan and logistics for your in-person or virtual events.
- Budget checklist(s) that identifies items to consider as you put together your plan and budget for your in-person or virtual events.
- Speaker checklist that highlights items to consider as you invite and prepare speakers/presenters for your in-person or virtual events.

While these checklists work in conjunction with each other, they are set up in a way that a project manager can separate the tasks among his or her team and still be able to track the planning and budgeting progress.

In light of COVID-19, please refer to your state and local government's regulations pertaining to group gatherings and adhere to those policies. For a list of additional resources, we suggest visiting the CDC website as well.

Make sure you check out the materials in the Speaker's Toolkit as you plan your event presentation. The Speaker's Toolkit contains:

- [Pre-loaded PPT Deck](#)
- [Audience Guide](#)
- [Speaker's Kit](#)
- [Financial Wellness Infographic](#)
- [Financial Wellness Worksheet](#)

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Budget Checklist

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Speakers' Checklist

Program Template



Glossary of Terms

In-Person Event

Event specifications: Document that outlines physical meeting space, audio-visual (AV), and catering needs for the event. Example: General session room to accommodate # of estimated attendees, # of breakout rooms, and # of expected attendees for each of those rooms; AV needs for each space; catering needs (breakfast, lunch, breaks, dinner, etc.).

Facilitation company: Company that can assist with content development and facilitating the event sessions.

AV: Audio-visual (projector, screen, microphones, sound, Wi-Fi, etc.)

Registration configuration: System for hosting website/registration page. Example: Google forms, Cvent, etc.

Run of show: Detailed breakdown of event by session that includes session name, time, location, facilitator, and meeting materials/supplies.

Sponsorship opportunities: Examples include keynote speaker, general sessions, meals, giveaways, etc.

Giveaways: Branded lanyards, tote bags, note pads, etc.

Credit card/merchant fees: Fees charged/collected for using a vendor service to collect registration fees and material sales.

Virtual Event

Event specifications: Document that outlines the platform the event will utilize, if a technology company will be needed/used, and how the event will be structured. Example: General session to accommodate # of estimated attendees, # of breakout spaces, and # of attendees and facilitators for each of those breakout spaces.

Technology company: Company that can assist with the technology end of the event. Example: Tech support for virtual event platform and session management, working with various virtual platforms for one event, etc.

Facilitation company: Company that can assist with content development and facilitating the sessions.

Virtual meeting platform: System(s) used to host the event. Example: Zoom, GoToWebinar, Microsoft Teams, etc., or by email or phone.

Equipment: Equipment participants will need to access the virtual meeting (computer, laptop, microphones, Wi-Fi, etc.).

Registration configuration: System for hosting website/registration page. Example: Google forms, Cvent, etc.

Run of show: Detailed breakdown of event by session that includes session name, time, session URL, facilitator, meeting materials/supplies.

Sponsorship opportunities: Examples include keynote speaker, general sessions and breakout sessions.

Credit card/merchant fees: Fees charged/collected for using a vendor service to collect registration fees.