

PATIENT EDUCATIONAL SEMINAR CHECKLIST

PRE-SEMINAR ACTIVITIES

- Assemble planning committee
- Decide on program model
- Create agenda
- Decide on date and time
- Draft a budget for the seminar
- Request funding (hospital, group practice, medical device company)
- Investigate locations
- Develop promotion plan
- Order (or reserve) needed audiovisual equipment
- Contract for location space
- Identify speakers
- Identify an event manager
- Identify a seminar leader
- Monitor and adjust budget as necessary
- Send confirmation letter and speaker packets to speakers
- Set up registration
- Obtain, format and copy speakers' biographies
- Obtain speakers' slides
- Monitor registration
- Adjust marketing strategies as necessary based on registration reports
- Identify handouts and make enough copies based on registration numbers
- Copy slide presentations (if you will be distributing them at the seminar)
- Copy evaluation forms and agendas
- Prepare program books (agenda, slides, speaker biographies, evaluations, etc.)
- Print off several copies of the registration list to be used to check in participants
- Identify who will be available to work the registration table
- Contact the event location at least three days prior to event (or by the date specified in your contract) to give them final set up instructions, including the number of seats you will need, audiovisual equipment specifications, food and beverage orders, and minimums
- Cut checks for speaker honorarium (if applicable)

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DAY OF SEMINAR ACTIVITIES

Event manager arrives at least 2-3 hours prior to event (how long before the event will depend on how much set up is necessary)

Meet with the location's event manager to go over room set up, audiovisual set up, and food order and quantity

Meet with the person who will be your primary contact during the event (often in hotels this person is not the same person you have been working with) and get his/her card so that you can easily contact him/her

Verify that the room is set up (set up may still be in progress) correctly

Verify that audiovisual equipment is working and is compatible with your equipment (e.g., laptop)

Set up the registration area (If registration is large, you may want to split registration up alphabetically. Have seminar packet and handouts ready to give to registrants)

Know where the restrooms and phones are so that you may direct attendees when asked

Sign in individuals as they arrive (be sure to have them verify that their contact information is correct for follow up)

Seminar leader kicks off the seminar, introduces speakers, reminds attendees to fill out the evaluation forms and closes the seminar

If appropriate, staff registration table(s) throughout and after the presentation for on-site scheduling of patient appointments

POST-SEMINAR ACTIVITIES

Summarize evaluations

Process speaker reimbursements (if applicable)

Send speaker thank-you letters with a copy of the evaluation summary

Note any changes you would make to future programs based on feedback from the evaluations

Email the evaluation summary to key stakeholders/ program funding sources (hospital, group practice, medical device company)

Reconcile all expenses with the original budget

Share the evaluation summary with your Medtronic sales representative to determine the next steps in the market development process