



Conference Planning 101

INTRODUCTION

Organizing a conference will require hard work, dedication, and organization, but the experience can be enriching! In this guide, you will find some guidelines, marketing suggestions, and administrative and vendor information that will assist you in planning your conference.

This guide has been compiled based on helpful information from previous student groups and updated by the Office of Student Life staff. If you have any suggestions, corrections, or questions, please do not hesitate to contact a member of the Office of Student Life at mbastudentlife@wharton.upenn.edu. Good Luck!

GETTING STARTED

Students should **start planning a minimum of 8-12 months in advance**. Although this seems a little early, please remember that:

- a) venue selection may be limited
- b) available dates on the school calendar go quickly
- c) high-profile speakers tend to book their schedule 6 months to a year in advance.

When asked what they would do differently, former student chairs unanimously replied: Plan ahead! We urge you to read through the following sections of this guide and carry them out promptly.

EXECUTIVE COMMITTEE

A solid executive committee of dedicated, hardworking people is vital to a successful conference. Designate an Executive Committee as soon as possible.

When recruiting volunteers, **don't forget to recruit Wharton undergraduates!** Wharton undergraduates can be a great source of talented labor and a marketing vehicle. Below is a list of possible positions and duties you could use to build your committee:

<u>Position</u>	<u>Description</u>
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Chair(s)	Responsible for overseeing the entire conference. Duties include ensuring that all operations run smoothly, following up with VPs to monitor progress, motivating volunteers, creating and tracking a budget, scheduling meetings, and providing leadership and direction. Consider having co-chairs to divvy up the work and lead the way!
Marketing VP	Responsible for overseeing all marketing aspects. Marketing can be the most time-consuming area and the most essential task. Therefore, it is advisable to select several volunteers to help. Consider selecting directors to handle specific tasks.
Director of Student Relations	Responsible for motivating students to attend the conference. Duties include sending out communications to the Wharton community, advertising flyers around JMHH and Penn, and hyping up the conference to the student body. Also responsible for publicizing conferences for local and regional universities. Report to Marketing VP.
Director of University Relations	Responsible for encouraging the university to participate in the conference by placing ads in the Daily Pennsylvanian, the Almanac, etc., emailing other schools such as Engineering, Law, Annenberg, Perelman, and contacting GAPSA. Report to Marketing VP.
Director of Community Relations	Responsible for contacting members outside the University community, such as the Philadelphia Chamber of Commerce, business councils, consulates, local businesses, etc. Report to Marketing VP.
Director of Alumni Relations	Responsible for creating and maintaining the alumni database, contacting and sharing information with alums and alum clubs, and acting as liaison between the conference and the Alumni Affairs Office. Report to Marketing VP.
Director of Public Relations	Liaises with the Wharton Communications Office to encourage media coverage. Writes articles for Wharton and Penn publications. Report to Marketing VP.
Director of Website Development	Responsible for overseeing the development and design of the website, including online registration. Also responsible for updating and maintaining the website. Report to Marketing VP.
Director of Promotional Materials	Responsible for providing content and designing programs, posters, and flyers. Report to Marketing VP.
Director of Sales	Responsible for overseeing ticket sales and monitoring sales (online, via mail, and at school). Duties include recruiting volunteers to sell tickets and managing a comprehensive list of confirmed registrants. Also responsible for preparing name badges.

Corporate Relations VP	Responsible for securing sponsorships by sending out solicitation letters and following up with companies to request sponsorship. Also responsible for obtaining sponsors' logos, banners, posters, giveaways, etc., and sending out thank you letters.
Treasurer	Responsible for submitting deposits, approving reimbursements, and paying invoices. Also responsible for appraising the Chair of the conference's financial status.
Logistics VP	Responsible for selecting hotel/conference venue and ensuring that all onsite services and equipment have been accounted for, including A/V, telephone, internet services, food, beverages, easels, microphones, etc. Also responsible for onsite registration.
Content VP	Responsible for supervising the selection of panel topics, invited panelists, and correspondence between panel directors and invited speakers.
Panel Directors	Act as the point person between the speaker and the conference. Follow up with invited speakers to confirm attendance, request bios and photos, send information to speakers, and coordinate travel arrangements. Report to Content VP.

SET UP GROUP CHATS & REGULAR PLANNING MEETINGS

Considering the large number of people and the tremendous amount of work involved in organizing a conference, it is advisable to set up a group chat or utilize Slack for communication among the organizers. **Meet with past executive committee members to ascertain that all data and information have been uploaded to the appropriate cloud-sharing service your club is utilizing.** Information such as speaker contacts, sponsor contacts, vendor information, attendance data, mailing lists, etc., should be listed. The transfer of information from one group to the next is essential to ensure the continuity of the conferences. Much time and energy are wasted each year in reinventing the wheel due to misplacement of data.

SELECT A DATE & VENUE

It is advisable to secure a conference site as early as possible. Most conferences use off-campus facilities. Philadelphia is a popular conference destination, and hotels book up rather quickly. This is especially important if you intend to organize a conference for 400+ attendees since only a handful of hotels can accommodate groups of this size. Contact various hotels to receive a list of available dates and ask if their facilities meet your needs, e.g., breakout space, size, number of large ballrooms, etc. Once they have indicated that they have the necessary facilities, visit the site to confirm the quality and size of the rooms. Find out how long reservations can be held, cancellation deadlines, sleeping room requirements, etc.

If you are interested in using university facilities, several lecture halls and auditoriums are at your disposal. Please note that these spaces also book up rather quickly. Popular sites include the Penn Museum, Bodek Lounge, Irvine, and Annenberg. Below is a table you can utilize to find on and off-campus sites:

Suggested Off-Campus Sites	Suggested On-Campus Sites
The Bellevue Hotel	Penn Event Spaces
Hilton Philadelphia at Penn Landings	Wharton Event Spaces
Wyndham Philadelphia Historic District	Annenberg Center for Performing Arts
Doubletree by the Hilton Hotel Philadelphia	Penn Museum
Loews Philadelphia Hotel	Perelman Quadrangle
The Inn at Penn, a Hilton Hotel	University Club @ Penn
Sofitel Philadelphia at Rittenhouse Square	Perelman School of Medicine
Pennsylvania Convention Center	Penn Athletics Facilities & Penn Park
Philadelphia Marriott Downtown	Penn Law School
Sheraton Society Hill	
Sheraton Philadelphia Downtown	
The Rittenhouse Hotel	
The Study at University City	

Selecting A Date:

Prior to securing a date and locking in a space on campus, review the [MyWharton calendar](#) and [WGA calendar](#) for available dates. Wharton holds numerous events throughout the school year. Ensure your desired date does not conflict with another major event or conference. Avoid dates that come before or follow a major holiday. Once you have selected a date, lock in the date by requesting it to be advertised on the MyWharton and WGA calendars.

DEVELOP A THEME & PANEL TOPICS

Every conference needs a theme! Your conference theme should highlight the educational objective of the conference. Your theme is also necessary when contacting and sending invitations to your speakers and panelists. Be sure to review the themes of prior conferences to have an idea of what's been done before and to assist with brainstorming your current conference theme. Please remember that the Wharton School's high academic reputation should be reflected in the speakers' quality and the depth of the discourse during your conference. Your conference has the Wharton name behind it, which needs to be reflected positively!

SPEAKERS & PANELISTS

There are policies and guidelines for not only asking someone to speak but also how to go about booking a speaker for your conference. **Each speaker that a group, club, department, or individual wishes to invite to a Wharton event, whether on campus or off-site, MUST be approved by the Dean's Office (and, sometimes, the University) before any invitation is extended.** Each speaker request must be submitted using the school-wide [Speaker Approval Management System](#). Requests are typically processed within three business days. Speakers that require additional review may take up to 2 weeks to receive final approval. Failure to abide by this policy may result in losing Wharton and University resources.

Helpful Tips:

- It is Wharton's policy not to pay a speaker; however, a thank-you gift (valued at around \$25) is perfectly acceptable.
- Click here to download a [Speaker Checklist](#) template to help make sure you do not forget any details.
- **All speakers on or off campus at a Wharton event must complete a media release.** Direct the speaker to the appropriate online [Wharton Media Release form](#)

Keynote Speakers

Securing high-profile speakers is not as easy as people think. Although Wharton has a strong brand, please remember that CEOs, political leaders, ex-presidents, ambassadors, entrepreneurs, VCs, etc., are extremely busy people who book their schedules several months in advance. It is advisable to send out keynote invitation letters as early as possible. Marketing the conference is much easier once you've secured at least one. When sending out keynote invitations, send them in waves of 10 letters. Follow up with invitees two weeks after letters have been sent. Always attempt to get 1 or 2 more keynotes than you need since cancellation occurs frequently.

Panelists

Securing panelists tends to be easier than securing keynotes. Brainstorm with your group to devise a list of targeted speakers and go after them. A robust and exciting list of panelists can serve as your most effective sales pitch.

Be prepared for the possibility that a panelist or moderator may cancel very close to the conference date. Maintaining a list of potential panelists who could be secured within a limited time frame is wise.

Once a speaker/panelist has been confirmed, please ask your panel directors to request a bio and photo from the speaker. One hundred fifty words per speaker bio is a good length. Do not underestimate the difficulty of procuring speaker photos and bios and the time required. Please remember that a program can look sparse and unprofessional without bios and pictures.

Also, remember to ask your panel directors to follow up with the speakers/panelists regarding travel, hotel arrangements, program agenda, arrival time, departure time, a/v needs, etc. Many speakers expressed frustration at being left in the dark until a couple of days before the conference. Please remember that speakers/panelists are extremely busy people who have taken the time out of their busy schedules to participate in your conference. Please act in a respectful, considerate manner.

FUNDRAISING & SPONSORSHIP

Organizing a conference is a costly endeavor. Depending on the size of your conference, most conferences usually run between \$40,000 - \$130,000. The earlier student groups mobilize their fundraising efforts, the more successful they will be in raising money and finding sponsors for their events. Please keep in mind that companies have limited sponsorship funds. The later you wait to solicit funds, the greater risk you run that the sponsorship pool may be dry by the time your request is reviewed.

In crafting a strategy to solicit funds, please remember that companies are bombarded with requests for sponsorships from all different organizations. Potential sponsors will want to assess how your conference's objectives will increase their visibility and presence at Wharton. Be prepared to answer the following questions: What events/panels do you have planned? How can the company play a role in making them a success? How much financial assistance is requested? What benefits can the company receive in return for their financial contribution?

All sponsorships and donations must be made out to the Wharton Graduate Association. You can work with WGA to secure sponsorship funds and complete the appropriate sponsorship intake forms. Review the [Sponsorship Intake and Forms](#) tab on the WGA website. Always remember to send Thank You letters with all sponsorships and donations!

Helpful Hints When Soliciting Funds:

1. Ask early. A good number of companies make their sponsorship decisions between May and July.
2. Create an attractive list of benefits.
3. Include any marketing materials, e.g., past brochures, articles, website addresses, etc., with your solicitation letter. Sell your conference as the hottest event on campus/in Philadelphia!
4. **Leverage any student contacts that you may have.** Remember -- most sponsorship funds come from the company's recruiting budget. Ask second-year students to solicit funds from their summer employers – this is usually the most effective strategy for securing funds!

5. Follow up! Follow up! Follow up! Recruiters are very busy, and your request for funds is probably low on the totem pole. Companies are most likely interested in learning about sponsorship opportunities but must be reminded that a prompt response would be appreciated. Be persistent.

6. For company contacts, ask around! Career Management, Office of Student Life, Corporate and Foundation Relations, and current students are excellent sources for finding helpful contacts. Don't forget about our alumni database, MyPenn.

[Working With Wharton External Affairs](#)

Wharton External Affairs and the Development and Alumni Relations Office can help student groups raise funds. However, please remember that their resources are limited, and they strive to secure funds for the entire school, not just student groups. They can connect you with companies interested in a particular area. It is always a good idea to email their office to let them know what your plans are. They can also assist you by providing you with some leads.

[Other Resources](#)

Don't forget to tap into university-allocated funds. Specific centers and institutes may also be interested in helping. For example, the Center for Africana Studies, Lesbian Gay Bisexual Transgender Gay Center, etc., have partnered with Wharton conferences in the past. For additional funding opportunities, review the below list of grants, funds and sponsorships:

Diversity & Inclusion Fund
Campaign for Community
Wellness Grant
Sachs Program for Arts
Office of the Provost Funding Opportunities
GAPSA Sponsorship
WGA Sponsorship

PROMOTIONAL MATERIALS

Planning a conference entails designing save-the-dates, flyers, programs, and a website. Having attractive, mistake-free marketing materials is essential to the successful branding of your conference. Your conference's flyers, website, and printed materials are the first impressions targeted marketing groups will have of your conference and Wharton. Therefore, publications must be proofread very carefully to avoid mistakes.

[Use Of The Wharton Logo](#)

Wharton strives to have a consistent brand image, and correctly using the Wharton/Penn logo is a primary part of that effort. The consistent and effective use of Wharton's logo plays a vital role in strengthening the identity and visibility of the School and University overall and increasing the individual impact of each communication. There are strict guidelines that must be followed when using the logo. To ensure proper use of the logo, visit the [Branding Your Event](#) page on the Wharton Marketing and Communications Team website.

Print Materials

Having excellent, professional-looking print materials is essential to creating a solid brand. **Do not underestimate the time required to design and print marketing materials.** Although you will retain a vendor to design the materials, you will still need to provide the designer with content and remember that proofs must be exchanged several times before the final draft is completed. Printing the materials usually takes two weeks. Some materials that you may want to consider printing:

Posters: Attractive, informative posters can effectively attract attention to your conference. Try to limit the information in the poster to what is essential to attract attention. Visual impact is your marketing goal. Posters should go up 2 – 4 weeks in advance.

Program Brochure: Creating a program brochure is very time-consuming and challenging. The program should include a schedule, description of panels, speaker bios and photos (if feasible), sponsor ads, welcome letters, and acknowledgments. Do not underestimate the challenge of collecting speaker bios and sponsor ads. The program should look as professional as possible. The program brochure is the only tangible item attendees take to remind them of the conference. Aim to have all content to the designer a minimum of one month before the conference date.

WEBSITE DEVELOPMENT & ONLINE REGISTRATION

The conference website is the easiest way to obtain information about your conference. Create a homepage as quickly as possible and add information to it as soon as that information becomes available. Links to past conferences' websites help market the current year's event.

Helpful Hints for Designing A Website:

1. Register the website with various search engines such as Square Space or Wix, etc. This will help to increase traffic to your website.
2. Request password-protected website access once the frame has been developed. Free access to the website will allow you to make text and graphic changes to the website. This will enable you to update the website instantaneously and reduce maintenance costs. Designate only one person to make these changes; otherwise, simultaneously, changes can cancel each other out.

3. Request logos from sponsors in EPS or JPEG format. EPS and JPEG are more easily manipulated than TIF or PPT. Logos in MSWord are unacceptable.

4. Request a training session from the website developer on how to use HTML, Microsoft Frontpage, etc., for maintenance purposes.

***Print developers can also assist with web design to create a standard look.

Registration

Most of your attendees will register online. All conferences outsource online registration to various online registration companies—fees for online registration range from 3% to 8%.

Consider Using:

- Eventbrite
- Campus Groups
- Creative Repute

Features you should look for include the ability to collect data, manage databases, track data, use a global listserv, be password/user ID sensitive, process refunds, etc.

When deciding on online ticket sales, don't forget to discuss price strategies such as group rates, advance registration, etc.

BUDGET

Once you have a rough idea of the costs for site and equipment rental, food, and marketing, establish a realistic budget. Determine the funds you will need to raise to cover your expenses. When creating a budget, please consider the service and tax charges. For example, most hotels have a 20% service fee. As for taxes, the WGA is exempt from both federal and state taxes.

All student conferences fall under the purview of the WGA. Therefore, your conference should have a WGA account. All conference-related expenses should be submitted to the WGA and signed by the CFO. If you do not have a WGA account, you can establish one by contacting WGA.

All WGA clubs and conferences must follow a budget and report the budget to the WGA within two weeks of the start of the school year. These budgets ensure that all clubs and conferences plan and spend according to their funds each year.

All budgets must be submitted using the [WGA budget template](#) and submitted to wga.finance.general@gmail.com. Clubs that have not yet submitted budgets are not eligible for reimbursements.

MARKETING

It is of utmost importance to the conference's success and to the branding of the Wharton name that conference rooms are filled to capacity. Please keep in mind that a half-filled room can dampen the mood and energy of the conference. Furthermore, speakers and panelists will probably be disappointed to have traveled so far to speak to only a handful of people. Marketing will take up the bulk of your time. Do not underestimate the time and energy needed to market your conferences effectively! Determine what your goals are and what markets you intend to target. Recent conference attendance data has indicated that approximately half of the conference attendees comprised alumni and community members. In other words, look beyond the student population for attendance. Conferences usually target four markets:

- 1) Wharton/Penn students
- 2) Wharton alumni
- 3) Regional schools
- 4) Philadelphia business community

Conferences also attempt to attract regional and national attention by soliciting media sponsorships.

1. Wharton/Penn students

Approximately one-half of your conference attendees will be Wharton and Penn students. Some practical ways to reach them are through listservs, Campus Groups, social media, Slack, and utilizing the WGA calendar.

Follow the MBA Class Listserv Usage Guidelines below to send emails through the MBA Class listserv:

MBA Class listservs are for official University, MBA Program, and designated WGA-approved club communications. Communications sent to the MBA Class listservs are closely monitored and are subject to moderation and approval by the MBA Program Office. Emails are reviewed by a member of the MBA Program Office Monday through Friday during business hours, usually within two business days of receipt (these guidelines are subject to change).

MBA Class Listserv Usage Guidelines:

- Programming, events, and resources marketed via the Class Listserv emails must be open to all MBA students
- Communications that are not University, MBA Program, or WGA-approved club affiliated will not be approved
- Emails marketing events/programs that conflict with class will not be approved
- Communications sent by individual students who are not representatives of a WGA-approved club or conference will not be approved
- Personal sales and advertisements of products or services will not be approved

- Emails marketing any sale (tickets, swag, etc.) must be sent by an official representative of a club
- WGA-approved clubs and conferences are permitted three emails per school year – one during the post-Club Pub email blitz (usually 48 hours following Club Pub) for recruitment purposes and two additional emails at any time during the school year.
- If you have any questions or assistance, please get in touch with the MBA Program at mbaprogram@wharton.upenn.edu.

Please note that there are separate listservs for graduate and undergraduate students. There are various ways to reach student groups. One way is to contact each school's admissions or student affairs office to inquire about their student listservs. Below is some contact information:

School	Contact
Annenberg School for Communications	Front Desk: contact@asc.upenn.edu
Penn Carey Law School	Student Affairs: mdislam@law.upenn.edu
Penn Social Policy & Practice	Student Services: jonesjen@sp2.upenn.edu
School of Dental Medicine	Margaret Yang: xiaojiao@upenn.edu
Graduate School of Arts and Sciences	Kelly Walsh: kelalsh@sas.upenn.edu
Perelman School of Medicine	Carrie Renner: rennerc@upenn.edu
Wharton Undergraduate	Lisa Podolsky: lisapod@wharton.upenn.edu
Penn Graduate School of Education	GSE: gse-staf@gse.upenn.edu
Penn Engineering School	Bryanna Bonner: bryannab@seas.upenn.edu
WEMBA	Nancy Dupont: dupontn@wharton.upenn.edu

[2. Wharton Alumni](#)

The best way to reach out to alumni is through the website Mypenn.Upenn.edu. You can work with External Affairs and the Development and Alumni Relations Office to determine the appropriate communication channels. We ask that you reach out to alumni eight weeks in advance.

[3. Other Schools](#)

Wharton conferences have successfully attracted graduate and undergraduate students from other schools. To contact specific student clubs, please visit the school's Student Life website. Usually, club and contact information is posted there. Below are several:

- [Harvard Business School](#)
- [Columbia Business School](#)
- [New York University Stern](#)
- [Stanford Business School](#)
- [Northwestern Kellogg Business School](#)
- [University of Chicago Booth School of Business](#)
- [Massachusetts Institute of Technology Sloan School](#)

- [University of California, Berkeley Haas](#)
- [Yale University School of Management](#)
- [University of Michigan Ross School of Business](#)

In addition to sending emails, it is also a great idea to solicit help from current students at these schools. If you or members of your conference know people at these schools, be sure to ask them to lend a helping hand with advertising your conference.

4. Philadelphia Business Community

More and more of Philadelphia's business community members have participated in Wharton conferences. Attracting Philadelphia's business community members has several advantages: strengthening the ties between Wharton and Philadelphia, ensuring strong turnout, and earning substantial profit margins. Past conferences have significantly benefited from creating a strong alliance with local business councils. In return for limited visibility, these local business councils offer Wharton conferences access to their mailing list, help promote the conference, and may also create a link to the conference's website. Forming alliances with local businesses is a strategic move worth considering.

For international conferences, in addition to contacting them, you may want to contact the numerous embassies and consulates located in Philadelphia. [Here is a link to a list of embassies and consulates in Philadelphia.](#)

Public at Large

For a broader-based marketing strategy, many groups have solicited media sponsorships from companies such as the Asian Wall Street Journal, FastCompany, Localbusiness.com, etc. For assistance with press releases, email Wharton Communications at communications@wharton.upenn.edu.

Another incredible Wharton media resource is Knowledge@Wharton. K@W has been partnered with student conferences for several years. K@W brochures help to promote conferences by writing articles in K@W about the conferences. 80,000+ registered users read K@W, which increases the coverage of the conference. For more information, contact Knowledge@wharton.upenn.edu.

Admissions has also been very helpful regarding marketing conferences. Admissions representatives travel throughout the States and overseas to host information sessions. They would be more than happy to distribute brochures, flyers, etc., at these information sessions. For more information, please get in touch with Park Watson at rpwatson@wharton.upenn.edu. Alternatively, please feel free to drop by Admissions in Vance to chat with a member of their office!

PRINT MATERIALS

Once you have decided on which designer and printer you will use, you will have to start drafting the content for your program. The most time-consuming project is creating the

program. You will need to draft the entire content for the program, such as panel descriptions, obtain a welcome letter from the Dean, request bios and pictures from speakers/panelists, and request ads from sponsors. The legwork required for this project is tremendous since several follow-ups must be made to secure ads, photos, and bios.

Attempt to have the bulk of the program finalized a month before the conference to give you some wiggle room. Most designers will be able to make changes, e.g., speaker additions/cancellations, for a reasonable fee as long as the brochure's layout isn't drastically altered. As for the print job, most printers can complete it if given 7 –10 business days; however, there may be a premium fee placed on short turnaround jobs.

Keep in Mind:

- All digital photos should be in JPEG or TIF files. MSWord is not acceptable.
- Sponsor logos should be in JPEG or EPS files.
- If you're unsure about additions to the program, such as speaker bios, ask the designer to create placeholders for you. Creating placeholders is much cheaper than asking the designer to revamp the layout.
- Print cost depends on the cut of the brochure and the number of colors used. Black and white are the cheapest; 4 colors are the most expensive.
- Print cost also depends on turnaround time.
- Most of the costs related to printing are fixed. Hence, there may be a marginal price difference between printing 200 brochures and 2,000 of them. However, once a job is on press, there is no turning back...therefore, have several eyes carefully proofread everything before going to press.

Most posters can be printed rather quickly using digital printing. The quality of digital printing is poorer than that of conventional printing. However, digital printing is much cheaper than traditional printing and can be completed within a few days. Creating foam-backed posters is expensive, but the visual impact is so significant that it may be worth the cost. Again, carefully proofread everything before going to press.

ORDERING PROMOTIONAL ITEMS & SWAG

Below is a list of trusted vendors to assist with creating promotional items such as swag or gifts for your guests:

- [Mainline Sports Wear](#)
- [The Barash Group](#)
- [Shore Designs](#)
- [Pride Products](#)

If the above vendors cannot meet your event's needs, peruse [Penn's Supplier list](#) to find a vendor that does! Please note that you must work with an approved University vendor when placing orders.