The abbreviated planning grid below gives you a quick overview of the process and timeline for a properly executed event.

Phase 1: Initial Meeting and Event Consultation - Meeting between Activity Director and Educational Programming Manger - Review 7-Phase Activity Planning Process - Review previous conference budget and pros/cons, *if applicable* - Discuss and reserve potential dates, location - Review CME requirements and deadlines	10-12 Months Prior to Activity
Phase 2: CME Application and Development - Activity Director to begin planning activity Topics/theme/speakers - Once Agenda is drafted, and keynote speaker(s) confirmed, begin completing the CME Application - Establish Planning Timeline with Grant Deadlines (IIE) - Decide on Commercial Support Companies/Pharmaceutical Reps, *if applicable* - Submit, Review, Revise CME Application and Planner/Presenter and Disclosure Forms with the Certification Team until all required documents are submitted and approved	8-10 Months Prior to Activity
Phase 3: Activity Approval and Launch - Finalize the approval of the CME application (6 months) - Send Estimate Program Budget to Activity Director for Review & Approval - Sign and Return Fiscal/Certification Letter from Activity Director - Discuss targeted companies and relevant grant components with Grant Coordinator, grant research to begin - Assign Educational Event Coordinator (IIE)	6-8 Months Prior to Activity
Phase 4: Commercial Support & Marketing Planning - Grant Coordinator to begin submitting grant applications (6 months) - Develop Marketing/promotional Strategy (IIE) - Begin content development and layout for direct marketing collateral - Plan and reserve catering, media, furniture, etc. - Begin any external speaker travel and hotel needs - Approve and print direct marketing collateral	5-6 Months Prior to Activity
Phase 5: - Build and open registration website, ideally 4 months prior to event - Grants Coordinator to notify Edu. Activity coordinator when grants are received - Educational Coordinators to update website and conference materials with current commercial support and certification information - Send email invitations to intended audience - Internal PR/Affiliates, Social Media - Send email invitation to Exhibitor database, 250+ names - Collect all speaker/faculty forms	3-4 Months Prior to Activity

Phase 6: Course Delivery	1 month prior to Activity
- Create syllabus, if needed - Review/modify presentations for ACCME rules; Print and upload Presentations - Finalize catering numbers, room layouts, etc. - Review on-site staff support - Certification team to prepare post-event evaluation	
Phase 7: Post Activity	1-3 months post- Activity
- Process expenses and Speaker Reimbursement/Honorarium - Provide Financial Summary & Evaluation Summary - Meet with Activity Directors(s) to debrief, review *Post-event Program Summary* - Email 3-month evaluation to participants - Grant Coordinator completes and submits grants reconciliations, *if required*	