



Plan Your Next Congress with *Confidence.*

The Complete Guide for Associations and Professional Bodies
Covering In-Person, Virtual, and Hybrid Conferences

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INTRODUCTION

Why This Guide Exists

Planning a conference, congress, or annual general meeting is one of the most high-impact activities an association or professional body can undertake. A well-executed event strengthens your membership, positions your organisation as a thought leader, generates revenue, creates lasting professional connections across your industry, and drives breakthroughs through idea-sharing and collaboration.

But it is also one of the most complex. From setting objectives and managing budgets to coordinating speakers, selling sponsorship, managing delegate registration data, venue logistics, audio-visual production, and increasingly hybrid or fully virtual delivery — the process demands expertise that most association secretariats were never designed to handle alone, and time that many don't have available.

This guide was created to change that. Whether you are a board member planning your first conference, an association executive looking to improve your next annual congress, or a committee chair weighing up in-person versus virtual formats, this resource will walk you through every critical stage of the planning process.

■ ■ Who is this guide for?

Association directors, board members, conference committee chairs, membership managers, and anyone responsible for planning a professional conference, congress, AGM, symposium, or seminar on behalf of an association, professional body, or learned society.

CHAPTER 1

Setting Your Conference Objectives

Every successful conference starts with a clear answer to one question: *what do we want to achieve?* Without well-defined objectives, every subsequent decision risks being made in a vacuum.

1.1 Define Your Purpose

The most effective conferences serve multiple goals simultaneously, but one or two should take priority. Common association conference objectives include:

- Knowledge dissemination and continuing professional development
- Networking and community building among members
- Revenue generation through registrations, sponsorship, and exhibitions
- Advocacy and raising the profile of your profession or sector
- Talent development and recognition through awards and poster sessions
- Governance activities such as AGMs and elections

■ Action Step

Before any planning begins, convene your organising committee and agree on no more than three primary objectives. Document these in writing and use them as a decision-making filter throughout the planning process.

1.2 Know Your Audience

Understanding your delegates is essential for designing a conference they will actually attend and value. Consider:

- Their professional level and seniority
- Geographic spread and willingness to travel
- Preferred learning formats (lectures, workshops, panel discussions, networking)
- Budget constraints and whether their employers fund attendance
- Their digital literacy and appetite for virtual participation

If your association has run previous events, analyse past attendance data, post-event survey results, and registration patterns. If this is your first conference, survey your membership directly. Even a short questionnaire can reveal preferences around dates, locations, topics, and format.

1.3 Choosing Your Format: In-Person, Virtual, or Hybrid

One of the most consequential decisions you will make early on is whether to host an in-person conference, a fully virtual event, or a hybrid. Each format has distinct strengths and trade-offs.

Consideration	In-Person	Virtual	Hybrid
Networking quality	Excellent	Limited	Good (requires design)
Geographic reach	Limited by travel	Global	Global
Cost to delegates	Higher (travel + acc)	Lower	Flexible by ticket type
Organiser complexity	High	Moderate	Very high
Revenue potential	Strong	Growing	Highest (dual audiences)
Content longevity	Low (unless recorded)	High (on-demand)	High
Accessibility	Venue-dependent	Strong	Strongest
Sponsor ROI tracking	Harder to measure	Highly measurable	Best of both

There is no universally correct answer. The right format depends on your objectives, your audience, your budget, and your organisational capacity. Many associations now adopt a phased approach: a strong in-person event as the anchor, with select sessions live-streamed and an on-demand library available afterwards.

CHAPTER 2

Building Your Organising Committee

No conference succeeds as a solo effort. An effective organising committee brings together people with complementary skills, clear responsibilities, and a shared vision for the event.

2.1 Key Roles to Fill

Conference Chair: Provides overall leadership, sets the vision, chairs committee meetings, and serves as the public face of the event.

Programme Chair: Responsible for intellectual content, including themes, speaker selection, call for papers, and session formats.

Finance & Sponsorship Lead: Manages the budget, tracks income and expenditure, and leads sponsorship acquisition.

Marketing & Communications Lead: Drives delegate acquisition through email campaigns, social media, PR, and the conference website.

Logistics Coordinator: Oversees venue liaison, catering, signage, delegate packs, transport, and on-the-day operations.

Technology Lead: Manages the streaming platform, event app, Wi-Fi requirements, and AV coordination — critical for hybrid and virtual events.

2.2 Committee Best Practices

Establish a regular meeting cadence from day one — typically monthly in the early stages, moving to fortnightly and then weekly as the event approaches. Use a shared project management tool to track action items, deadlines, and decisions. Ensure every committee member has a clearly documented scope of responsibility to prevent duplication or gaps.

CHAPTER 3

Working with a Professional Conference Organiser

A Professional Conference Organiser (PCO) is a specialist firm that plans and delivers conferences on behalf of associations, academic bodies, and professional organisations. A good PCO acts as an extension of your team, bringing deep expertise in logistics, supplier management, registration, financial control, and crisis response.

3.1 What Does a PCO Actually Do?

The scope of PCO services is broad and can be tailored to your needs. Common services include:

General event management: End-to-end coordination, timeline management, and secretariat services — acting as the central contact for delegates, speakers, exhibitors, and sponsors.

Financial management: Budget development, cashflow tracking, risk management, and post-event financial reporting.

Registration & delegate management: Online registration portals using specialised Conference Management software to track delegate data, process payments, manage communications, and provide on-site check-in.

Venue & supplier coordination: Sourcing and negotiating with venues, hotels, caterers, AV suppliers, and transport providers. Strong industry contacts often result in favourable rates.

Programme support: Call-for-papers management, abstract review workflows, programme scheduling, and proceedings production.

Sponsorship & exhibition management: Designing packages, creating a sales prospectus, soliciting sponsors and exhibitors, managing floor plans, and on-site exhibitor support.

Marketing & promotion: Conference website development, email campaigns, social media management, and media outreach.

Hybrid & virtual production: Platform selection, live-streaming coordination, virtual engagement tools, and on-demand content delivery.

3.2 When Should You Hire a PCO?

The short answer: **earlier than you think**. If your conference expects more than 50 delegates, involves international participants, includes a multi-track programme, requires sponsorship and exhibition management, or will be delivered in a hybrid format — a PCO will almost certainly save you time, money, and stress.

Common Mistake

Associations frequently overestimate what their internal team can manage. The cost of a PCO is almost always less than the cost of mistakes, missed deadlines, and lost sponsorship revenue caused by under-resourced planning.

3.3 How to Brief and Select a PCO

The standard approach is to issue a Request for Proposals (RFP). A well-prepared RFP should include:

- 1. Association background:** Your mission, membership size, structure, and global representation.
- 2. Event overview:** History of the conference, typical delegate numbers, programme structure, social programme, and sponsorship track record.
- 3. Objectives:** What you are hoping to achieve with this edition, including any innovations or improvements.
- 4. Scope of services:** Be specific about which services you need and which you will handle in-house.
- 5. Budget parameters:** Be transparent about your budget range. This allows PCOs to propose realistic solutions.
- 6. Cost structure format:** Request that all bidders present their fees in the same format so you can compare fairly.
- 7. Selection criteria and timeline:** Outline how you will evaluate proposals and when you will make a decision.

3.4 Evaluating PCO Proposals

- Track record with similar-sized events in your sector or discipline
- Quality and depth of the proposal — this reflects how they will approach your event
- Named team members and their experience, not just the company brand
- Technology capabilities, particularly for registration and hybrid delivery
- Transparent pricing with no hidden costs
- References from comparable associations
- Industry accreditations such as ICCA or IAPCO membership

CHAPTER 4

Budgeting and Financial Management

Financial discipline is one of the most important — and most frequently neglected — aspects of conference planning. A sound budget is your financial safety net.

4.1 Building Your Conference Budget

A comprehensive conference budget accounts for both fixed costs (those that do not change regardless of delegate numbers) and variable costs (those that scale with attendance).

Fixed Costs

- Venue hire and room setup
- Audio-visual equipment and technical support
- Streaming platform licensing (for hybrid or virtual)
- Conference website development and maintenance
- Marketing and delegate acquisition campaigns
- PCO management fees
- Insurance

Variable Costs

- Catering (per delegate per day)
- Delegate packs, name badges, and printed materials
- Speaker travel, accommodation, and honoraria
- Social programme events (gala dinner, excursions)
- Event app licensing (often per-user)
- On-site staffing and temporary labour

Contingency

Always include a contingency line of **10–15%** of total expenditure. Conferences are live events and unforeseen costs are inevitable.

■ Budget Tip

Create three budget scenarios: conservative (70% of target registrations), expected (100%), and optimistic (120%). Plan your expenditure to the conservative scenario and treat the difference as upside.

4.2 Revenue Streams

The typical association conference funds itself through delegate registration fees (often tiered: early bird, standard, late, member, non-member, student), sponsorship packages, exhibition stand sales, social programme ticket sales, advertising in conference materials, and on-demand content access fees.

Do not rely solely on registration income. A healthy budget typically draws **40–60%** of revenue from registrations and **30–50%** from sponsorship and exhibitions.

CHAPTER 5

Venue Selection and Logistics

5.1 Choosing the Right Venue

Your venue sets the tone for the entire event. Key criteria to evaluate include:

Capacity: Can the venue comfortably accommodate your expected numbers across plenary, breakout, exhibition, and catering spaces?

Location & accessibility: Easy to reach by air, rail, and road? Ample parking? Accessible for delegates with mobility needs?

Technical infrastructure: Quality of built-in AV, lighting, and acoustics? Wi-Fi robust enough for hundreds of simultaneous connections and live streaming?

Accommodation: Sufficient hotel options nearby? Can you negotiate a room block at a discounted rate?

Flexibility: Can the space be configured to suit your programme? Separate areas for networking, exhibitions, and quiet working?

Hidden costs: Ask specifically about charges for external suppliers, corkage, parking, internet bandwidth upgrades, and after-hours access.

5.2 Venue Considerations for Virtual Events

If your conference is fully virtual, you do not need a traditional venue — but you do need a production base. Many organisers use a small studio or broadcast room for keynotes. Key requirements include high-speed hardwired internet, professional lighting and audio, a visually appropriate backdrop, and a technical producer managing the live stream.

5.3 Negotiating with Venues

Everything is negotiable. Ask about complimentary meeting rooms for your organising committee, discounted or free accommodation for speakers and committee members, waived corkage and AV fees, complimentary tea and coffee stations, airport shuttle services, and discounted delegate rates at partner hotels.

CHAPTER 6

Delegate Registration and Communications

Your registration process is the first operational touchpoint delegates have with your conference. It shapes their first impression and sets the tone for their entire experience.

6.1 Setting Up Registration

- A branded, user-friendly online registration portal that works on desktop and mobile
- Multiple ticket types: member, non-member, student, day pass, virtual-only, full hybrid
- Secure payment processing with multiple options (card, EFT, invoice)
- Automated confirmation emails and receipts
- Session and workshop selection at the point of registration
- Dietary and accessibility requirement capture
- Social programme and add-on event booking
- GDPR and POPIA-compliant data handling

6.2 Pricing Strategy

A tiered pricing approach encourages early commitment and helps with cashflow planning:

Tier	Timing	Purpose
Early Bird	4–6 months before	Incentivise early registration and generate cashflow
Standard	2–4 months before	Standard rate for the majority of delegates
Late / On-site	Final 2 months + walk-ins	Premium rate to recover higher admin costs
Member Rate	All periods	Reward membership and incentivise renewals
Student / Early Career	All periods	Lower barrier for emerging professionals
Virtual-Only	All periods	Lower fee reflecting reduced costs for remote delegates

6.3 Delegate Communications Timeline

12 months out	Save the date announcement to your membership database
9 months out	Conference website live with initial programme, venue info, and call for abstracts
6 months out	Registration opens with early bird pricing. First e-newsletter to membership.
4 months out	Programme finalised and published. Speaker announcements. Marketing campaign intensifies.

2 months out	Early bird deadline reminder. Practical information email (travel, accommodation).
2 weeks out	Final logistics email with venue details, app download instructions, and programme highlights.
During event	Daily updates via event app, push notifications for session reminders and changes.
1 week after	Thank you email with post-event survey, on-demand recordings, and save the date for next year.

CHAPTER 7

Programme Design and Speaker Management

7.1 Designing an Engaging Programme

The programme is the intellectual heart of your conference. Mix session formats to maintain energy and cater to different learning styles:

- Plenary keynotes for high-profile thought leadership
- Parallel tracks for specialist topics
- Panel discussions for debate and diverse perspectives
- Workshops and masterclasses for hands-on skills development
- Poster sessions for emerging research and early-career researchers
- Lightning talks for pace and variety

■ Programme Tip

For hybrid events, design your virtual agenda around shorter, more focused sessions. Virtual delegates disengage after about 45–60 minutes. Build in frequent interaction points: live polls, Q&A, and breakout discussions every 15–20 minutes.

7.2 Managing Speakers

- A formal invitation letter with clear expectations (topic, duration, format, audience profile, AV requirements)
- A speaker agreement covering consent for recording, streaming, and post-event publication
- A dedicated speaker liaison managing travel, accommodation, and technical rehearsals
- A speaker briefing document covering the programme schedule, venue layout, AV setup, and housekeeping
- For hybrid events: coaching on presenting to a dual audience — addressing the camera, acknowledging online questions, and designing slides readable on both projector and laptop

7.3 Abstract Management

For academic and research conferences, the call for abstracts and peer review process are significant workstreams. Invest in a dedicated abstract management system rather than managing submissions via email. A good system handles submission intake, reviewer assignment and blind review workflows, scoring and acceptance decision management, and programme scheduling based on accepted submissions.

CHAPTER 8

Sponsorship and Exhibition Management

8.1 Designing Sponsorship Packages

- **Platinum / Premier Sponsor:** Exclusive naming rights, keynote introduction, premium exhibition stand, logo on all materials, delegate list access, post-event analytics report.
- **Gold Sponsor:** Named session, prominent exhibition stand, logo on conference website and programme, social media mentions.
- **Silver Sponsor:** Exhibition stand, logo on website, insert in delegate pack, sponsored refreshment break.
- **Bronze / Supporter:** Logo on website, acknowledgement in programme, exhibition stand or tabletop display.

Increasingly, associations are moving beyond traditional tiered packages towards bespoke partnership models that allow sponsors to choose the activation elements most relevant to their objectives.

8.2 Sponsorship for Virtual and Hybrid Events

- Sponsored virtual lounges and networking rooms
- Branded pre-roll video before session recordings
- Sponsored push notifications via the event app
- Exclusive access to on-demand content libraries
- Sponsored gamification or engagement challenges
- Detailed digital engagement analytics showing impressions, clicks, and dwell time on sponsor content

■ Sponsorship Tip

Reframe sponsors and exhibitors in your communications as "industry partners" or "knowledge partners." This positioning signals value rather than commercialism and makes delegates more receptive to engaging with them.

8.3 Exhibition Management

Treat the exhibition as an event within the event. Ensure the exhibition space is in a high-traffic area — ideally adjacent to catering or networking areas. Create micro-events within the exhibition area to maximise interaction. Provide exhibitors with a comprehensive pack covering stand specifications, setup times, power and Wi-Fi details, shipping instructions, and branding guidelines.

CHAPTER 9

Delivering a Virtual Conference

Running a fully virtual conference is not simply pointing a camera at a speaker and pressing record. It requires a fundamentally different approach to production, engagement, and delegate experience.

9.1 Choosing a Virtual Event Platform

- Live streaming quality and reliability
- Interactive features: live polls, Q&A, chat, breakout rooms
- Networking tools: matchmaking, one-on-one video meetings, virtual lounges
- On-demand content library with post-event access
- Sponsor and exhibitor integration: virtual booths, branded spaces
- Registration and payment integration
- Analytics and reporting: attendance tracking, session engagement, content views
- Accessibility: closed captions, transcripts, screen reader compatibility
- Security: GDPR compliance, SSO, encrypted data

9.2 Producing Engaging Virtual Content

- Keep sessions to a maximum of 30–45 minutes, with 15-minute breaks between
- Open every session with an interactive element: a poll, a provocation, or a direct question
- Use a professional moderator or host to manage transitions and curate questions
- Invest in production quality: professional lighting, clear audio, and stable high-speed internet are non-negotiable
- Pre-record keynotes for reliability, but keep panel discussions and Q&A sessions live
- Offer on-demand access to all recorded sessions for at least 30 days post-event

9.3 Virtual Networking

Networking is the most challenging aspect of virtual events to replicate. With intentional design it can be effective. Strategies include: structured speed-networking sessions, AI-powered matchmaking based on shared interests, virtual coffee lounges, buddy programmes pairing experienced members with first-time attendees, and asynchronous discussion forums that open before and remain active after the event.

CHAPTER 10

Delivering a Hybrid Conference

Hybrid conferences combine the energy and networking of an in-person event with the reach of a virtual one. They also represent the highest level of organisational complexity — you are, in effect, running two events simultaneously.

10.1 Core Principles for Hybrid Success

- 1. Design for both audiences from day one:** Virtual delegates should never feel like an afterthought. Every session and touchpoint should consider both audiences.
- 2. Staff accordingly:** You need a production team for the broadcast, moderators for virtual engagement, and on-site crew. Understaffing is the fastest path to a poor experience.
- 3. Invest in AV and connectivity:** Professional-grade cameras, microphones, and a hardwired internet connection are essential. Poor audio or video quality will cause virtual delegates to disengage immediately.
- 4. Coach your speakers:** Speakers must learn to present to a dual audience: look at the camera periodically, acknowledge online questions, and design slides readable on both projector and laptop.
- 5. Create parity of experience:** Virtual delegates need dedicated networking sessions, exclusive content or early access to recordings, and a dedicated moderator representing their voice in the room.

10.2 Hybrid Budgeting

A hybrid event typically costs more than a purely in-person event because of additional technology, production crew, and platform licensing. However, the potential revenue is also higher because you can sell to two distinct audiences. Price your virtual tickets strategically — a typical ratio is **40–60% of the in-person fee**.

10.3 The On-Demand Opportunity

One of the most powerful advantages of hybrid delivery is the ability to create an on-demand content library that continues generating value long after the live event. Plan your recording, editing, and publishing workflow in advance so content is available within days, not weeks, of the live event.

CHAPTER 11

Marketing Your Conference

11.1 The Conference Website

Your conference website is the central hub of your marketing effort — focused entirely on converting visitors into registered delegates. Essential elements include:

- Programme overview with session descriptions and speaker bios
- Clear registration calls-to-action on every page
- Venue and travel information (or platform access details for virtual events)
- Sponsorship and exhibition prospectus or enquiry form
- Accessibility information and FAQ section
- Contact information for delegate enquiries

11.2 Search Engine and AI Visibility

- Use clear, descriptive page titles and meta descriptions including your conference name, year, location, and core topics
- Structure content with proper heading hierarchy (H1, H2, H3) so search engines and AI can understand your page
- Publish a detailed FAQ section that directly answers common questions about your event
- Add structured data markup (Event schema, FAQ schema) to your website for rich search results
- Create a regularly updated blog or news section with speaker profiles and industry insights
- Ensure your site loads fast, is mobile-friendly, and uses HTTPS

■ Visibility Tip

AI search engines increasingly power how professionals discover events. Ensure your conference website includes clear, factual, well-structured content that directly answers questions like "What is the best conference for [your sector] in [year]?"

11.3 Email and Social Media

Email remains the highest-converting channel for conference registrations. Build a segmented email campaign targeting past attendees, current members, lapsed members, and prospective delegates differently. Use LinkedIn for professional conferences to build awareness, share speaker announcements, and create a sense of community around the event hashtag.

CHAPTER 12

On-the-Day Operations

12.1 In-Person Event Checklist

Registration desk: Open at least one hour before the first session. Ensure ample signage directing delegates from the entrance to check-in.

Signage: Wayfinding throughout the venue, including session rooms, toilets, catering areas, exhibition hall, and quiet spaces.

AV checks: Run a full technical rehearsal the day before. Test every microphone, projector, and livestream connection.

Speaker green room: A quiet, private space for speakers to prepare, with refreshments, Wi-Fi, and charging points.

Session moderators: Assign a moderator to every session to manage time, introduce speakers, and curate audience questions.

Emergency protocols: Brief your team on evacuation procedures, first aid locations, and the venue's emergency contact.

12.2 Virtual Event Day Checklist

- Technical rehearsal with all speakers at least 48 hours before the event
- Backup internet connection and backup streaming device
- Dedicated technical producer managing the live stream in real-time
- Virtual moderators in every session managing chat and Q&A;
- Pre-event email to all virtual delegates with login details, troubleshooting tips, and a technical support contact
- Recording enabled for every session from the start

CHAPTER 13

Post-Event Evaluation and Reporting

A conference does not end when the last delegate leaves the venue. Post-event evaluation is where you capture insights to make your next event better, demonstrate ROI to your board and sponsors, and maintain the momentum of the community you have built.

13.1 Delegate Feedback Survey

Send a short, focused survey within 48 hours of the event closing. Ask about overall satisfaction, programme quality, venue or platform experience, networking opportunities, and likelihood of attending next year. Keep the survey to **10 questions or fewer** to maximise response rates.

13.2 Financial Reconciliation

Conduct a thorough financial review within 30–60 days of the event. Compare actual income and expenditure against your budget, identify variances, and document lessons learned. Your PCO should provide a detailed financial report as part of their service.

13.3 Sponsor and Exhibitor Reporting

Deliver a comprehensive post-event report to every sponsor and exhibitor, including delegate demographics, attendance numbers by session, digital engagement metrics (for hybrid and virtual), feedback scores, and photos or video highlights. This report is your most powerful tool for securing return sponsorship for next year.

13.4 Content Afterlife

Do not let your conference content gather dust. Publish recorded sessions in an on-demand library, turn key presentations into blog posts or white papers, share speaker highlights on social media, and create a post-event highlights video that serves as both a record of the event and a promotional tool for the next one.

CHAPTER 14

Your Conference Planning Timeline

The following timeline provides a month-by-month framework for planning a mid-sized association conference over a 12-month period. Adjust based on your event's complexity and scale.

Timeframe	Key Activities
12 months out	Define objectives, form organising committee, appoint PCO, begin venue search
10–11 months	Confirm venue, launch conference website, open call for abstracts/papers, begin sponsorship outreach
8–9 months	Open registration (early bird), finalise sponsorship packages, announce keynote speakers
6–7 months	Close call for abstracts, conduct peer review, build programme, intensify marketing
4–5 months	Publish full programme, close early bird registration, confirm all speakers and sponsors
2–3 months	Send delegate logistics pack, finalise catering and AV, brief virtual/hybrid production team
1 month	Technical rehearsals, final registration push, prepare delegate packs and signage
Event week	Final venue walkthrough, speaker briefings, on-site team briefing, run event
Post-event	Send survey, publish on-demand content, deliver sponsor reports, financial reconciliation

NEXT STEPS

How Kaleidoscope Conferences Can Help

Planning a conference is a significant undertaking — but you do not have to do it alone.

Kaleidoscope Conferences is a specialist Professional Conference Organiser (PCO) based in Cape Town, South Africa, serving associations and professional bodies locally and internationally. We partner with organisations to plan, manage, and deliver exceptional conferences, congresses, and professional events — whether in-person, virtual, or hybrid.

OUR SERVICES

- Full-service conference and congress management
- Delegate registration and communications management
- Sponsorship strategy, sales, and exhibitor coordination
- Programme design and abstract management support
- Virtual and hybrid event production
- Conference website design and marketing
- Financial management and post-event reporting
- Venue sourcing and supplier negotiation

■ Get in Touch

Whether you are planning your first conference or looking to elevate an established annual event, we would welcome the opportunity to discuss how we can support you.

Email: info@kaleidoscopeconferences.com

Website: www.kaleidoscopeconferences.com

Book a free, no-obligation consultation to discuss your next event.

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