PLANNER CHECKLIST

1 START WITH THE BASICS

→ Meeting name, date(s), and time

→ Location and estimated attendance

→ Seating style or room setup (as applicable)

2 DEFINE MEETING REQUIREMENTS

→ Accommodation needs (if required)

→ Food & beverage requirements

→ AV and technical needs

→ Clearly distinguish must-haves from preferences

3 NARROW SEARCH RESULTS

→ Use filters to narrow by hotel brand, venue type, amenities, and location

→ Prioritize corporate rates, preferred or approved venues

→ Consider ISO-certified Green Stay venues

4 SEND RFPS AND COMPARE OFFERS

→ Send requests to at least 5 venues to improve response rates

→ Review responses in your dashboard

→ Compare offers side by side

→ Select the best-fit option align with policy and confirm the booking

5 MANAGE YOUR BOOKINGS

→ View all upcoming and past meetings in the Bookings dashboard

→ Access the booking confirmation page for full details

→ Edit booking details or cancel if needed

→ Manage all booking changes in HRS Connect