

MEETING CHECKLIST

Follow these best practices to ensure valuable experiences for meeting participants.

BEFORE

- Create and distribute an agenda and establish clearly defined goals for your meeting. Identify what, if any, decisions participants will make during your scheduled meeting time.
- Carefully select your participants. Ensure that all attendees have a clear understanding of why they have been asked to attend and what will be expected of them during the meeting.
- Identify the type of meeting that best aligns with your goals (inform, solve, or decide). Select corresponding tools designed to facilitate participation.
- Reserve a meeting space that is appropriate for the size of your group and the type of meeting you plan to hold. Schedule adequate time to cover your entire agenda, including any necessary breaks.
- Prepare and distribute thoughtful and thorough pre-read materials and give your participants sufficient time to review.

DURING

- Begin and end on time. Stick to the agenda unless it is appropriate to deviate, such as during a brainstorming session. Note any potentially valuable off-topic items for consideration at a later time.
- Reiterate goals and review your agenda; set ground rules for participation.
- Encourage participation from all attendees by using the tools selected during the planning phase.
- Summarize meeting content and assign tasks with due dates.
- Discuss any necessary follow-up and agree on timing for subsequent meetings.

AFTER

- Circulate notes and action items to stakeholders who were unable to attend.
- Send invitations for any agreed upon follow-up meetings.
- Request feedback from participants on the level of value generated by your time together.
- Communicate project status and any successes that resulted from your meeting and thank participants for their contributions.