MEETING CHECKLIST

Use this checklist to conduct efficient meetings that meet objectives and engage participants.

PREPARE

- [ ] Set an agenda that states the meeting purpose, objectives, and meaningful topics.
    - Purpose: Why is this meeting needed?
    - Objective: What are the expected outcomes?
    - Topics: What is being discussed? Ask yourself how the topic will benefit those present.

- [ ] Assign a time limit to each discussion item and organize them in order of priority.

- [ ] Select attendees. Choose participants who will have clear roles and are tied to the outcomes.

- [ ] Send out necessary materials in advance of the meeting, including the agenda.
    - This will free up time for discussion and decision-making.
    - Be realistic about the time needed to review materials before the meeting.

- [ ] Prepare visual aids (PowerPoint, video, images) that you will use during the meeting.

CONDUCT

- [ ] Walk everyone through the agenda at the start of the meeting.

- [ ] Assign a notetaker during the meeting to record key decisions and action items.
    - The facilitator should not be the notetaker.
    - Send out notes as soon as possible after the meeting.

- [ ] Manage time.
    - If a discussion item exceeds its time limit, decide whether to continue the conversation and drop another item off the agenda, or close the discussion and move on.

- [ ] End the meeting by summarizing key points, assigning action items, and deciding if any topics need to be discussed later.

FACILITATE

- [ ] Facilitate meaningful discussion during the meeting to increase efficiency and productivity.

- [ ] Create an environment where everyone feels comfortable contributing.
    - Establish roles, distribute materials, and communicate the purpose of the meeting.

- [ ] Ask high-impact questions that encourage brainstorming and sharing.
    - What have we learned from this project? How will this affect our work? What patterns have you noticed? Why are we doing it this way? Is there anything we missed?

- [ ] Focus on body language and encourage participants to share their ideas.
    - Who looks engaged, who is reserved, who is waiting to speak?

- [ ] Clarify and summarize points throughout the meeting to ensure understanding.

- [ ] Seek feedback when closing the meeting.
    - Ask participants what they thought of the meeting and if anything is unresolved