



# Effective Meeting Checklist

Learn how to plan and execute an efficient, effective and productive meeting using this meeting checklist. It breaks down the steps into preparation, execution and follow-up tasks to help you get your meetings on track.

Having meetings for the sake of meeting is a waste of time. All meetings should have an agenda to follow and meet an objective. An effective meeting leaves attendees with the satisfaction that something has been accomplished.



# Meeting Checklist

---

## Preparation (Pre-Meeting)

Prior to the meeting, the meeting leader should perform the following:

- ☐ Set the goal or the objective of the meeting, or what will be accomplished.
- ☐ Decide who should attend the meeting—who will be vital to the discussion and integral to reaching the desired goal? Be sure to ask someone to be the meeting recorder—someone will be responsible for taking detailed notes and later transcribing them and sending them out to the attendees after the meeting.
- ☐ Establish and reserve proper meeting space to accommodate attendees.
- ☐ Set a date and time for the meeting to be held. To determine the date, consider how long the attendees may need to prepare for the meeting. Will they need to prepare reports or review information prior? Also consider how soon the objective of the meeting will need to be reached, and whether it is likely that further meetings will need to be held after the initial meeting.
- ☐ Prepare any documents necessary for the completion of the meeting and have them ready for distribution. If necessary, send documentation to attendees for review prior to the meeting and be sure to give plenty of time before the meeting for such a review.
- ☐ Convey meeting details to attendees. Be sure to spell out any instructions that must be followed prior to the meeting (e.g., review documents, prepare reports, collect and verify data, etc.). Ensure that plenty of time is available before the meeting date for attendees to prepare.
- ☐ Verify that attendees can all be present for the meeting.
- ☐ Write up an agenda that details which steps should be followed to achieve the desired meeting goal and stick with it. Depending on subject matter and desired goals of the meeting, some meetings may need to be scheduled for more than an hour. The optimal meeting length is around 45 minutes to an hour. If the meeting agenda will need to cover more information and discussion than can be accommodated in an hour, be sure participants understand and add in time for breaks to your agenda.

The agenda should include the following information:

- Meeting name
  - Date
  - For weekly meetings, previous week's achievements and integral dates for upcoming projects or other meetings
  - Objectives and goals listed in priority
  - Timeline of topics for discussion with times assigned to each and possibly who should take action for each item (which can also be decided in the meeting)
  - Time to decide next steps or further meetings (if necessary)
  - Meeting end time
- ❑ Reserve or ensure that whiteboards, flipcharts, projectors or screens, teleconferencing equipment and codes, and any other supplies will be available if necessary.
  - ❑ Send reminders to attendees at least a day or two before the meeting or several reminders if the meeting is farther into the future. Again, spell out any activities that must be performed prior to attending the meeting and list information that attendees must bring to the meeting that will be integral to the meeting's outcome.

## Execution (The Meeting)

- ❑ The meeting leader ensures the meeting begins on time. Send out an early reminder to the meeting. Then, arrive to the meeting destination early and be sure that attendees are present. Start the meeting at the time it was set. Punctual participants will feel that you value their time. Late participants will learn to show up on time for the next meeting if they know you will not wait.
- ❑ Distribute vital documentation and information, including the meeting agenda, to attendees at the beginning of the meeting. Give attendees a minute to look over any documentation that was not presented to them prior to the meeting. Briefly explain the agenda and what the objective of the meeting will be.
- ❑ Stick with the agenda and steer the meeting back on track should discussion deviate from the plan.

- ☐ Set time limits on discussions and remind attendees of the time constraints and what must be accomplished.
- ☐ Make sure everyone's input is heard—even from quiet attendees—and that suggestions are not crushed.
- ☐ Keep the meeting in a positive light. Don't allow negative discussions to get out of hand.
- ☐ Remember to take scheduled breaks if the meeting is longer than an hour.
- ☐ Vocalize a brief summary at the conclusion of the meeting and table any further discussions that may need to be extended for another meeting time (if necessary).
- ☐ Be sure the meeting recorder transcribes the detailed notes and ensure that they are distributed punctually after the meeting.

## Follow-Up

Not all meetings will require the following steps. Some meetings will be shorter and more to-the-point. These action items ensure that attendees have a firm grasp of what was decided in the meeting and gather feedback to ensure the success of subsequent meetings.

- ☐ Create a document of minutes and distribute it in a timely fashion.
- ☐ Give positive reinforcement to contributors. In a recap email or memo, thank attendees and reiterate good ideas and input and give recognition to the person or persons who contributed. Attendees respond favorably to positive reinforcement and seeing such recognition also encourages future attendees to speak up, knowing that their voices will be heard and considered.
- ☐ Have offline discussions with managers of attendees who had questions, who were negative toward other ideas, who didn't offer opinions or enter discussion, or who brought up issues with the discussion topics. Discuss whether outside issues may be causing such employees trouble and see if the manager can help clear the air while ensuring them that their opinions are valued.
- ☐ Ensure that the agenda was followed and objectives were met. If not, create a second meeting to finish the task.
- ☐ Ask attendees for feedback on how the meeting went and how further meetings could be better structured.