

MEETING MANAGEMENT CHECKLIST

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✓ Pre-meeting activities

1. Consider if a meeting is actually needed; avoid if possible.
2. Clarify purposes and outcomes of meeting; write them down.
3. Consider who is actually necessary to participate.
4. Check on availability of participants and facilities.
5. Set date and time.
6. Notify participants of the meeting; distinguish between those who are to attend and those who just need to know about it.
7. Check on feedback from participants regarding their attendance and need for preparation for the meeting.
8. Preview agenda; email to participants.
9. Gather reference materials; email where appropriate.

✓ Meeting activities

10. Start on time no matter who is in the room; do what you can with those present.
11. Review agenda; modify as needed; estimate times for each agenda item.
 - a) Least time: Information only.
 - b) More time: Information and clarifying discussion or input gathering.
 - c) Most time: Clarifying discussion, input, and decision-making.
12. Agree on order of agenda.
13. Take each agenda item in order.
14. Achieve closure on each item.
 - a) Clarity of information; Q/A.
 - b) Clarity of information; complete input; Q/A.
 - c) Clarity of decision; commitment to accurate implementation.
15. Identify action items, next steps, or follow-through activities required for implementation (who will do what by when).
16. Identify those outside the meeting that need to know what happened in the meeting.
17. Summarize the meeting; remind people of the step they have agreed to implement.
18. Set date and time for next meeting if needed.

✓ Follow-through activities

19. Prepare meeting notes accurately describing information points shared, agreements or decisions made, and follow-through steps recorded identifying who will do what by when.
20. Distribute meeting notes to all concerned.
21. Within a few days after the meeting, make follow-up calls to assure steps are being taken, agreements are being kept, decisions are being implemented, and obstacles to full implementation are identified and being handled.