Effective Meeting Checklist

To Meet or Not?

Ask yourself, "Is the meeting even necessary?" Can it be replaced by an email, a phone call or conference call? Make sure you know the specific purpose and objectives of the meeting (see Preparation Before a Meeting). What do you aim to get out of the meeting and is that aim best met/only met by having a meeting?

Preparation Before the Meeting
1. Determine the specific purpose and objectives and share them.
    a. Consider stating as a question ("review protocol" vs "what aspects of the protocol need clarity?")
    b. Determine and share what kind of meeting is this- will decisions be made, are you gathering information or input,…?
2. Who should write the invitation, manage the confirmation and cancellations?
3. How long will it last?
4. Who should be invited?
5. Anyone you need to talk beforehand (people with special needs –derailers…)
6. What is the topic?
7. What materials do we need?
8. What room should we use?
9. Does the technology work?
10. Send the agenda in advance
11. Set expectations

During the Meeting
1. Start on time
2. Clearly state the purpose of the meeting
3. Establish ground rules for the meeting. (On-time start, put cell phones/laptops away, make verbal comments brief and to the point, etc)
4. Assign someone to take notes and another person to keep time
5. Determine who receives meeting notes and by when
6. Environmental scanning-universal participation, side bar conversations, engagement
7. Review past action items and if they were implemented. If not, why not?
8. Leave time at the end for wrap up and next steps
9. Get feedback on the meeting

Wrap up and Follow up of the Meeting
1. Clearly state how agenda items have been resolved and what decisions have been made.
2. State who is responsible for any follow up items. Document in meeting notes.
3. Send meeting notes in timely fashion.
4. Consider if anyone needs follow up after the meeting.