

# A Checklist for Planning Your Next Big Meeting

In theory, everyone understands that preparation can make or break an important meeting. The more work you do before you walk into the room, the more productive and efficient you'll be. But who has the time to properly prepare? Our checklist makes meeting prep quick and easy—be sure to print it out or save it for later.



- ☐ Identify the purpose of the meeting
- ☐ Make sure you really need a meeting
- ☐ Develop a preliminary agenda
- ☐ Select the right participants
- ☐ Assign roles to participants
- ☐ Decide where and when to hold the meeting and confirm availability of the space
- ☐ Send the invitation and preliminary agenda to key participants and stakeholders
- ☐ Send any reports, pre-reading, or requests for materials that may require preparation from participants
- ☐ Identify the decision-making process that will be used in the meeting
- ☐ Identify, arrange for, and test any required equipment
- ☐ Finalize the agenda and distribute it to all participants
- ☐ Follow up with invitees in person, if appropriate
- ☐ Prepare yourself