

Meeting preparation checklist

The meeting preparation checklist below is designed to help you organise and run more productive company meetings. If you still need additional help, don't forget we also offer chairing meetings training in the UK – with comprehensive half-day and full-day courses available:



Meeting objectives/outcomes

- ☐ What key results do I want to achieve? For example, your aim might be to provide upward and downward communication, identify best practice and share experiences, make a decision, or generate new ideas and suggestions
- ☐ How will we know that the meeting has been successful?
- ☐ What past history or experience of these meetings (or the group participants), will help or hinder the achievement of the outcome?

Meeting agenda

- ☐ What format should the agenda take?
- ☐ Who is responsible for preparing and distributing the agenda?
- ☐ What supporting information is required?

Meeting timing

- ☐ How long should the meeting last?
- ☐ When is the best time to hold the meeting (day of the week and time of day)?
- ☐ How frequently should the meetings be held?
- ☐ What start and finish time will be scheduled?

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- ☐ What breaks do we need to schedule?

Participants

- ☐ Who should attend?
- ☐ Which guests and/or speakers are to be invited and what time do they need to schedule?
- ☐ Who will check confirmation of their attendance?

Role assignments

- ☐ What role assignments need to be made? E.g. chairperson, minute taker, facilitator and timekeeper.

Role clarity

- ☐ Having identified the assigned roles, what activities do each of the roles need to do before, during and after the meeting?

Physical arrangements

- ☐ Where geographically should the meeting/s be located?
- ☐ What type of environment do we want to create?
- ☐ How should the meeting room layout and seating be arranged?
- ☐ What facilities and equipment are needed?
- ☐ What refreshments are required?

Supporting materials

- ☐ What supporting materials such as presentation slides and handouts need to be produced and who will be assigned to complete this?

Evaluation method

- ☐ How should the meeting be evaluated in order to improve the next meeting? E.G. group review at end of meeting, evaluation form, follow up telephone discussion?

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