

Checklist for Business Meetings

An effective facilitator knows there are productive meetings that reach their goals, and meetings that fall far short. Here's an eight point checklist for planning and executing effective business meetings.



Prior to the meeting:

- ☐ Name the meeting. Choose the focus of the meeting, and give the meeting a title that conveys the goal. "Thursday's meeting" gives attendees no clue what the meeting is going to cover.
- ☐ Create a detailed agenda. Lay out the main points of the meeting in the order they will be addressed. It's a good idea to set a time range each topic will be discussed.
- ☐ Thoughtfully choose the participants. There's a fine line when inviting attendees. Don't leave people who are relevant to the topic out, but don't invite those who have nothing to contribute. Too many unnecessary people will derail the flow.
- ☐ Secure needed technology. Computers, white boards, projectors and such need to be in place well before the meeting time. It's imperative to test all technology in advance, so the first 30 minutes of the meeting isn't wasted trying to get everything working.
- ☐ Hire an effective facilitator. Productive meetings stem from the ability to stay on track. A facilitator helps make that happen. Major meetings can benefit greatly from a professional facilitator.

During the meeting:

- ☐ Start the meeting on time. Kick off the meeting on a positive note by beginning at the set time. Participants will appreciate the fact you value their time.
- ☐ Designate a note taker. Choose someone to take notes for the entire meeting, and email them out afterwards. This ensures everyone stays on the same page after the meeting, and understands the goals that were laid out.
- ☐ Build in question and answer time. It's critical to address the questions that arise during a meeting. Either set time for questions after each topic, or at the end.



Productive meetings move company goals and strategies forward, so it pays to plan and execute craftily. Follow these tips for the best meetings on the block!

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