

Meeting Preparation Checklist



INITIATE MEETING (2-3 WEEKS AHEAD IS IDEAL)

- ☐ Send GroupWise appointment with overview of purpose and desired outcome to: Key Attendees
- ☐ Schedule meeting room and any projectors or equipment

WEEK BEFORE

- ☐ Review purpose for meeting (confirm necessity)
- ☐ Send e-mail request for agenda items and materials for the meeting (attach previous minutes with assignments)
- ☐ Prepare draft agenda (include previous minutes with task assignments and send to co-leads if necessary)

TWO DAYS BEFORE

- ☐ Verify that the key players can attend the meeting
- ☐ Send draft agenda with meeting reminder to attendees
- ☐ Skim materials to review and understand key issues
- ☐ Confirm and prepare equipment and tools (laptop, flash-drive, projectors, flipcharts, etc.)
- ☐ Plan water/ refreshments if needed (keep in mind special dietary requirements)

DAY BEFORE

- ☐ Gather agenda, reports and reference materials
- ☐ Notify front desk/reception about the meeting (provide the names of external attendees) Note: For any external attendees: Coordinate parking/security access for external attendees, Email a map and directions to attendees

DAY OF MEETING

- ☐ Verify who's declined the meeting and ensure key players are still attending
- ☐ Take spare copies of minutes, agenda and reference materials
- ☐ Half-hour before meeting ensure the room is in order (optimal layout, equipment, AV, supplies, etc.)

Make and Share Free Checklists
checkli.com