

The Pre-Meeting Checklist



Interview the Meeting Sponsor/Boss - if this is you, INTERVIEW yourself.

- ☐ Define the roles in the meeting: yours as facilitator, the participants' as subject matter experts, the manager, the boss, etc...
- ☐ Define "CONTEXT" and how you recommend setting up the meeting: You'll be posting a Session Objective, Agenda, Agreements, Consensus, Parking Lot, U-Shape room set up
- ☐ How will decisions be made? (Recommend Consensus)

Important Questions to Ask:

- ☐ "Imagine the session is over ... you feel great about what happened. What happened in the meeting/project and what results were achieved that make you feel so good?"
- ☐ "What is the session objective" (or overall project objective)
- ☐ "What has been going well?"
- ☐ "What would you change?"
- ☐ "What might be some of the most important topics we discuss at this meeting?"
- ☐ "What else would be useful for me to know to make sure the meeting doesn't waste time?"
- ☐ "Who would you like to see at the meeting?"
- ☐ "How do you typically document meetings?"

Interview the Participants

- ☐ 1 st - Send an introductory "Welcome to the Team!" email explaining you would like to talk with them before the meeting to answer their questions and clarify their role.
- ☐ Set up Interviews – (15 minutes is average time needed) Face-to-face is best. Phone call, 2 nd best.
- ☐ Ask them the same questions as above.

Email 1: Ask all participants for feedback (This may be combined with Email 2, if details are completed)

- ☐ When the session objective and agenda are confirmed, send them to the participants asking for their feedback and questions. Confirm they understand their role in the meeting.

Email 2: Participant Logistics. Include:

- ☐ The start and end time of the meeting.
- ☐ Location and directions for meeting.
- ☐ (Ask participants to arrive 10 minutes early to enjoy coffee/tea and snacks. Friendly Reminder: you will kick off PROMPTLY at the start time).
- ☐ The Agenda.
- ☐ Any items to prepare before the meeting – read a document, etc.
- ☐ What to bring – data, a pen, sweater, food & H2O...
- ☐ Is Lunch provided? If no, a list of restaurants nearby.

Confirm Meeting Logistics

- ☐ Location of the meeting
- ☐ Who will set up the room?
- ☐ What time can we get in room to set up?
- ☐ Can we tape posters/charts on walls?
- ☐ What Audiovisuals are required?
- ☐ Who will bring the AV and set them up? What time?
- ☐ Refreshments? Lunch? - How many? Who will set it up? When?
- ☐ Who will kick off the meeting? - i.e. project sponsor, boss?
- ☐ Who contacts kickoff person to let them know how much time they have for opening remarks? (5 – 7 minutes is ideal)
- ☐ Who will record the minutes?
- ☐ Who will transcribe the chart pages?

Prepare your Facilitator Toolbox

☐ See Facilitator Toolbox Check list in Free Resources.

CREATE, MEMORIZE AND PRACTICE YOUR OPENING SCHEMES **Make and Share Free Checklists**
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