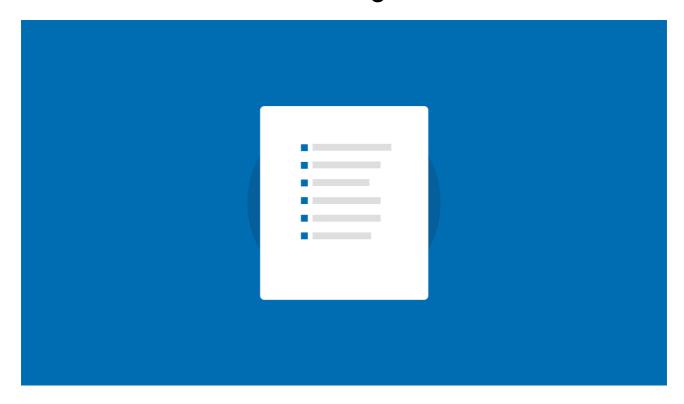
The Pre-Meeting Checklist



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 would you change?" "What would you change?" "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?"

Interview the Participants

"How do you typically document meetings?

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 SCMAKE and Share Free Checklists checkli.com