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 SCRIPT

Make and Share Free Checklists
checkli.com