Steps to Organize a Meeting

A free checklist to organize or plan your next business meeting.



HAVE YOU:

- [ ] Identified the purpose of the meeting?
- [ ] Made sure you really need a meeting?
- [ ] Developed a preliminary agenda?
- [ ] Selected the right participants and assigned roles?
- [ ] Decided where and when to hold the meeting?
- [ ] Confirmed the availability of the space?
- [ ] Sent the invitation?
- [ ] Sent the preliminary agenda to key participants and stakeholders?
- [ ] Sent pre-reading or requests which require advance preparation?
- [ ] Followed up with invitees in person, if appropriate?
- [ ] Chosen the decision-making process that will be used (Majority vote, group consensus, or leader's choice)?
- [ ] Identified, arranged for, and tested any required equipment?
- [ ] Finalized the agenda and distributed it to all participants?
- [ ] Verified that all key participants will attend and know their roles?
- [ ] Prepared yourself (drafted presentations, printed handouts, etc.)?

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