

# Business Meeting Checklist

By Jake R Brady

- Pre-Meeting
  - Decide on the purpose of the meeting.
  - Determine what will a successful outcome look like.
  - Choose a convenient day and time for meeting.
  - Book the meeting location.
  - Decide who must attend to reach the outcome.
  - Prepare the meeting agenda, with time periods for each section or topic of the meeting.
  - Prepare presentation tools, including laptop connections and handouts.
  - Designate a meeting note taker.
  - Determine the total budget spend for the meeting.
- Meeting
  - Arrive early enough to prepare the meeting room and yourself.
  - Start the meeting on time.
  - Confirm that everyone received and understood the agenda and is prepared to work.
  - Stick to the agenda.
  - Have the time-keeper tell you when it is nearing the end of the meeting so you can wrap it up.
  - Introduce the first agenda topic and indicate the preferred way of addressing it.
  - Alert the meeting members that agenda items are within 2 to 5 minutes of their allotted time.
  - Be sure to get any final thoughts out.
  - Confirm conclusions and commitments.
  - Talk about a future meeting to deal with 'extras' that came up during this meeting.
  - Thank participants.
- Post-Meeting
  - Type up the meeting notes.
  - Distribute the notes and follow up on next steps.
  - Research topics more thoroughly, if necessary.

- Set a date for a follow-up meeting.
- Get meeting participants' feedback.
- Communicate any major decisions to the rest of the company.