

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.