Business Meeting Checklist

Created: 12/22/2011

# Tasks:

☐ **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.**