

Meeting Purpose Planner (Template)

Every effective meeting starts with clarity. The clearer the purpose, the better the focus, participation, and results. Use this planner to define why the meeting is needed, who should attend, and what outcomes are expected.

1. Meeting Details

Meeting Title:

Date:

Time:

Duration:

Location / Link:

Meeting Type:

- ☐ Information sharing
 - ☐ Decision-making
 - ☐ Problem-solving
 - ☐ Brainstorming or planning
 - ☐ Progress review
 - ☐ Other:
-

2. Meeting Purpose

What is the primary reason for holding this meeting?

What decision, outcome, or agreement must be achieved by the end?

If this meeting did not happen, what would be the consequence?

3. Desired Outcomes

List up to three clear outcomes that define success.

- 1.
- 2.
- 3.

Success looks like:

- ☐ A decision made
 - ☐ A plan agreed
 - ☐ Information shared and understood
 - ☐ Issues resolved
 - ☐ Actions assigned and confirmed
-

4. Attendees and Roles

Required Participants:

Optional Participants:

Roles:

Chair / Facilitator:

Timekeeper:

Note-taker:

Action Owner (per topic):

Tip: Fewer attendees often mean faster, clearer outcomes. Only include people who contribute directly to the objective.

Notes

5. Agenda

Topic Lead Time Purpose (Discuss / Decide / Inform)

- 1.
- 2.
- 3.

Total Duration:

Tip: Allocate realistic times to each item. Prioritise important topics early in the meeting when attention and energy are highest.

6. Pre-Reading and Preparation

- ☐ Agenda and materials sent at least 24 hours before the meeting.
 - ☐ All participants have reviewed the information provided.
 - ☐ Any required data, reports, or proposals are complete and ready for discussion.
 - ☐ Expectations and preparation notes are clear to all attendees.
-

7. Expected Follow-Up

How will outcomes be recorded and shared?

- ☐ Summary email
- ☐ Action log
- ☐ Shared document or tracker
- ☐ Verbal recap in next meeting

Next Review Date:

Tip: Define how success will be tracked before the meeting begins. Accountability starts with clarity on how results will be followed up.

How to Use This Template

Complete this form before scheduling a meeting. Share it with participants alongside the invitation. When every meeting starts with purpose, time is respected, actions are clear, and results improve.