



Effective meeting checklist

You can use this template to help you prepare for and ensure your meetings are efficient, effective, and successful in driving your intended results!

Pre-meeting preparation:

- ☐ Define meeting purpose, type of meeting, and meeting objectives (Important: if information can be communicated using other tools or technology, consider eliminating the meeting)
- ☐ Create and distribute detailed agenda and associated materials to review
- ☐ Determine meeting length and schedule meeting
- ☐ Invite appropriate participants ensuring the group is not too big, consider optional participants
- ☐ Assign meeting roles (agenda item owners, facilitator, timekeeper, note-taker)
- ☐ Prepare meeting space or virtual platform, ensure working equipment and resources are set up and working
- ☐ Send reminder with agenda and any pre-work or preparation requirements for meeting,

During meeting:

- ☐ Start on time but be reasonable for technical issues (1 to 2 minutes max)
- ☐ Review agenda and set any applicable ground rules, consider ice breakers
- ☐ Facilitate discussion and decision-making, ensure any actions or decisions are documented, manage time
- ☐ Use visuals and interactive tools
- ☐ Respectfully, keep conversation from going off-topic using a parking lot if needed
- ☐ Summarize key points, determine any follow up actions, activities, or meetings
- ☐ End on time

Post-meeting:

- ☐ Thank participants and distribute meeting minutes as soon as possible, ideally within 24 hours
- ☐ Follow up on action items
- ☐ Schedule any necessary follow-up meetings or activities
- ☐ Gather feedback on meeting effectiveness

Additional meeting guidelines for consideration:

1. If meetings need to be canceled, ensure that you give plenty of notice (so that you're not wasting the participants' time preparing)
2. Come prepared to the meeting
3. Be present during the meeting as an active participator and listener
4. Reduce distractions – silence phones and don't text or message, close unnecessary open computer tabs
5. Don't interrupt others
6. Be respectful in disagreement by critiquing ideas and not people.
7. Don't dominate the discussion
8. Allow the meeting facilitator to manage the meeting
9. Respect the agenda and timing allocated to each topic
10. Mute your microphone when not speaking (in virtual meetings)