

The Essential Meeting Checklist for Organizers

From the *Insider's Guide to Better Meetings*

If you're the meeting organizer, moderator or leader, here's how you can make a difference and inspire others.

Before the meeting

Establish an objective – and stick to it!

What key decisions need to be made? What actions need to be taken? If you can't define the objective, you're not ready to call the meeting.

Choose your people carefully.

Be thoughtful when inviting people to your meeting – you're probably not the only person making demands on their time. No one wants a calendar full of back-to-back meetings.

Set the agenda.

For smaller meetings, a handful of bullets is enough. Larger meetings may need a more structured approach. Either way, send the agenda out so people come prepared.

Get clarity on goals.

Email or speak to each individual participant and ask, "What is your main goal for the meeting?" This way, you'll know who has similar views, helping you manage any conflicts.

Assign roles and share expectations.

Maximize everyone's time by assigning meeting roles and communicating your expectations upfront. Ensure that anyone who's presenting has prepared his or her supporting materials.

Establish meeting protocols.

When should people ask questions? Will latecomers be tolerated? Having to recap for the benefit of late arrivals is disruptive and wastes further time.

During the meeting

Orchestrate the discussion.

You need to guide the conversation, maintain the tempo and ensure no single voice drowns out everyone else. Encourage passives to speak up and talkers to take a break.

Appoint a timekeeper.

This will help the meeting run on schedule, so you can focus on the subject matter. The timekeeper should keep an eye on each agenda item and inform everyone when it's time to move on.

Keep your mind on the money.

Going round in circles? Remind the group of what the meeting truly costs, and encourage participants to decide whether that particular issue is worth dwelling on.

Don't spend hours on taking minutes.

Minutes provide a vital reference point, but they shouldn't be an arduous task. Just capture the essence of the discussion: ideas, feedback, decisions, next steps, action items and progress checks.

After the meeting

Follow up appropriately.

Circulate the minutes by email and continue to manage team communications so everyone stays informed of their responsibilities and any progress made.

More tips for effective meetings

Check out the rest of our *Insider's Guide to Better Meetings* and let your best work shine through.

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