

Checklist for a Productive Meeting:

Ways to Get More Done + Be Effective

Schedule meeting

- Choose the meeting date, time and location that works for you and your co-facilitator and/or your guests.
- *The inclusion of guests is dependent on the type of meeting you are hosting.

Confirm the location

- Confirm the meeting location is available and ready to support your meeting if you will host an in-person meeting.

Create an agenda

- Create an agenda based on the discussion topics that need to be addressed. Within the agenda establish the amount of time each agenda item will need.

Establish goals

- Be sure to establish meeting goals and objectives.

Create a vision

- Create a vision for the outcome you would be most happy with.

Send out an invite

- Send a meeting invite, if you use an online calendar, or an email with the meeting details.
- Be sure to attach the agenda to the meeting invite or include it in the body of the digital invite or to the email.

Confirm a note taker

- Confirm a note taker at least 5-7 days before the meeting.
- It's important that you are not facilitating the meeting and taking notes. It can be a challenge to do both.

Consider challenges

- Consider any roadblocks based on recent challenges and address them beforehand, if possible. DO NOT wait until the meeting to address.

Delegate tasks

- Think of tasks you will ask people to complete related to agenda items.



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Send a reminder

- Send a meeting reminder one week prior and 1-2 days before.

Test equipment

- Visit the venue to test the equipment 1-2 days prior to the meeting and connect to the WiFi or confirm the WiFi details. Bring the laptop you will use if you plan to use the A/V equipment.

Print handouts

- Print all handouts the day before the meeting, including an attendee list.

Begin the meeting

- Start the meeting by stating the goal of the meeting and reviewing the agenda.

Lead with an icebreaker

- Follow the statement of the goal with an icebreaker related to the meeting.
- Example ice breaker: What are you proud of today? or How are you feeling today? or What deliverable were you able to meet last week that you are proud of?



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