

EFFICIENT MEETING CHECKLIST

Use this checklist to conduct efficient meetings that meet objectives and engage participants.

PREPARE

- ☐ Set an agenda that states the meeting purpose, objectives, and meaningful topics.
 - Purpose: Why is this meeting needed?
 - Objective: What are the expected outcomes?
 - Topics: What is being discussed? Ask yourself how the topic will benefit those present.
- ☐ Assign a time limit to each discussion item and organize them in order of priority.
- ☐ Select attendees. Choose participants who will have clear roles and are tied to the outcomes.
- ☐ Send out necessary materials in advance of the meeting, including the agenda.
 - This will free up time for discussion and decision-making.
 - Be realistic about the time needed to review materials before the meeting.
- ☐ Prepare visual aids (PowerPoint, video, images) that you will use during the meeting.

CONDUCT

- ☐ Walk everyone through the agenda at the start of the meeting.
- ☐ Have each topic owner give a brief overview (1-2 min) of the “what” and “why” of their topic.
 - What is the project or initiative that will be discussed?
 - Why are they presenting it? (E.g., to give an update, seek feedback, or troubleshoot.)
- ☐ Assign a notetaker during the meeting to record key decisions and action items.
 - The facilitator should not be the notetaker.
 - Send out notes as soon as possible after the meeting.
- ☐ Manage time.
 - If a discussion item exceeds its time limit, decide whether to continue the conversation and drop another item off the agenda or close the discussion and move on.
- ☐ End the meeting by summarizing key points, assigning action items, and deciding if any topics need to be discussed later.

FACILITATE

- ☐ Facilitate meaningful discussion during the meeting to increase efficiency and productivity.
- ☐ Create an environment where everyone feels comfortable contributing.
 - Establish roles, distribute materials, and communicate the purpose of the meeting.
- ☐ Ask high-impact questions that encourage brainstorming and sharing.
 - What have we learned from this project? How will this affect our work? What patterns have you noticed? Why are we doing it this way? Is there anything we missed?
- ☐ Focus on body language and encourage participants to share their ideas.
 - Who looks engaged, who is reserved, who is waiting to speak?
- ☐ Clarify and summarize points throughout the meeting to ensure understanding.
- ☐ Seek feedback when closing the meeting.
 - Ask participants what they thought of the meeting and if anything is unresolved.