

Meeting Checklist

A before, during, and after checklist for meetings that actually get things done.

Decide If You Need a Meeting

- ☐ Confirm the goal can't be handled by a message or document
- ☐ Define the single outcome the meeting must achieve
- ☐ Choose the shortest time that fits the goal
 - Try 25 or 50 minutes to leave a buffer between calls.
- ☐ Invite only the people who decide or contribute
- ☐ Pick a time that respects attendees' schedules

Build the Agenda

- ☐ List each topic as a question or decision to make
- ☐ Assign a time estimate and an owner to each item
- ☐ Order topics by priority in case time runs short
- ☐ Note any pre-reading or prep attendees need
- ☐ Send the agenda at least a day in advance

Prepare Before the Meeting

- ☐ Confirm attendance and reschedule if key people can't join
- ☐ Book the room or set up the video link
- ☐ Test screen sharing, audio, and any equipment
 - A two-minute tech check prevents lost minutes.
- ☐ Gather documents, slides, or data you will present
- ☐ Assign someone to take notes

Run the Meeting

- ☐ Start on time and restate the goal and agenda
- ☐ Keep each topic within its time box
- ☐ Encourage quieter attendees to contribute
- ☐ Park off-topic items in a separate list
 - A parking lot keeps the agenda moving.
- ☐ Summarize decisions out loud before moving on
- ☐ End by recapping action items and owners

Capture Action Items

- ☐ Write each action as a clear, specific task
- ☐ Assign one owner to every action item
- ☐ Set a due date for each task
- ☐ Record decisions made during the meeting
- ☐ Note any open questions to resolve later

Follow Up After the Meeting

- ☐ Send notes and action items within a day
- ☐ Add tasks to your team's tracker or tool
- ☐ Share decisions with people who couldn't attend

☐ Check in on progress before the next meeting

A quick nudge keeps action items from stalling.

☐ Schedule any needed follow-up session