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