

You As A Meeting Facilitator



Activity

Note: The list is not in sequenced order and is not a complete list. Be creative and add your own ideas or best practices from peers.

Pre Meeting	Meeting Proper	Post Meeting
Set agenda.	Take the lead.	Send recap of meeting or minutes.
Send agenda to attendees at least 1 week out.	Show energy.	Confirm tasks assigned to attendees and deadline dates.
Write your objectives and expected outcomes.	Stay focused on the topic. Don't let attendees distract you.	Send thank you notes.
Make notes of items to cover.	Check your watch from time to time. Are you on track?	Transfer action items to follow-up lists, calendars, and "to-do" task lists.
Create notes regarding any private questions you have for attendees.	Keep attendees on track. Don't let them go off on tangents.	Update your calendar with future meeting dates.
Start a "Take to Meeting" pile. Coordinate or delegate all logistics.	Post a list of topics to be covered. Have an attendee check them off as completed.	Put files away that you took to the meeting.
Do your homework. Research topics.	Ask questions of attendees to clarify what you think you heard.	Send necessary information to non-attendees or tell alternate's team leader.
Designate someone to take meeting minutes.	If required, prepare attendance roster.	Get feedback from attendees.
Prepare softcopy presentations and hardcopy handouts.	Be on time!	Keep attendees informed of the status of projects discussed in meeting.
Assemble supplies and A/V.	Bring files or pertinent information.	Clean conference room and return all equipment.
Are lunch and/or refreshments to be served?	Check out meeting room and equipment prior to meeting.	Conduct a meeting survey.
Send directions and other logistical information to attendees outside the organization.	Before attendees arrive, test all equipment.	Make note of "personal lessons learned."
Confirm meeting in writing or by e-mail.	Bring closure to subjects and topics discussed.	

You As A Meeting Attendee

Pre Meeting	Meeting Proper	Post Meeting
Get an agenda.	Be on time!	Immediately review your notes from the meeting.
Do your homework. Research any necessary information.	Position yourself at the table to your advantage. Whom should you sit next to?	Mark any deadline date on your calendar.
Make a list of questions to bring to the meeting.	Stay focused on the topic. Don't stray when you speak.	Brief any team members who were unable to attend.
Prepare miscellaneous notes.	Pay attention to the speaker(s), even if they are not engaging.	Place "to do" items in your "to do" folder.
Find out whether you have to present any information.	Ask questions to clarify what you think you hear.	Write any follow-up correspondence.
Create and copy any necessary handouts.	Repeat any directions or assignments given to you.	Put files away.
Make plans for phone coverage.	Get deadline dates. Confirm any directions or requests given to you.	Make sure all handout materials get placed in related files.
Be sure to take your calendar.	Make sure all your questions are answered.	If you requested information from others at the meeting, write them a brief note stating your request and indicated deadline date.
Accumulate any pertinent materials you will need.	Have statistics or any backup materials with you in case you must prove your point.	Notify non-attendees of any important information or discussion ideas.
Put date and time on your calendar(s).	Review your materials and information.	If you are an alternate, let others know what transpired.
R.S.V.P.	Contribute and participate.	Mark your calendar for future meeting dates, etc.
Tell co-workers of your schedule.	Take accurate notes.	Respond quickly to action items or within a specified timeframe.
Gather all electronics you might need for meeting, such as laptop.	Keep a friendly attitude.	