Checklist for Running an Effective Meeting

Before the meeting

☐ Prepare by answering these questions.
- Why? Purpose of the meeting.
- What? Specific objectives to be accomplished by end of meeting.
- Who? Invite the right people.
- How? Develop a roadmap for the meeting.

☐ Then finalize the agenda (with timings) and send it to the right people in advance.

At the beginning of the meeting

☐ Get off to a good start.
- Review meeting purpose and agenda with participants.
- Clarify meeting roles and norms to create a safe space and encourage constructive behavior.
- Bring everyone current on relevant status.

During the meeting

☐ Make forward progress.
- Actively steer the course of the discussion.
- Use good decision-making techniques.
- Summarize points of agreement as they happen.
- Capture action items and decisions in real time.
- Defer sidebars.

☐ Periodically check the effectiveness of the meeting using the 4 P's.
- Progress.
- Process.
- Pace.
- People.

☐ Ensure everyone participates.

Near the end of the meeting

☐ Ensure closure.
- Summarize next steps at a high level.
- Review action items and decisions.
- For recurring meetings, occasionally evaluate effectiveness.
- Verify next meeting (time, location, and attendance).

After the meeting is over

☐ Send a concise written summary within 1 business day.
- Minimum: a list of decisions, a list of open action items, and info about the next meeting.

☐ Ensure action items are followed up.

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