USE YOUR VOICE TO SHAPE THE FUTURE

Team Meeting Worksheet

Use this checklist to help you set up and run effective meetings.

BEFORE THE MEETING

One-time meetings: *use the checklist below to make sure you don't forget anything.*
Recurring meetings: *create a template based on the checklist and use it for each meeting.*

- *Include the virtual meeting link and links to documents you'll use every time.*
- *Decide when the agenda needs to go out to the participants (1 day before? 1 week before?) and note it in your calendar.*

Agenda items to include:

- ☐ Title/Subject of meeting
- ☐ Meeting date and time
- ☐ Participant names, roles, contact information
- ☐ Virtual meeting link or location information
- ☐ Attachments or documents to read before the meeting
- ☐ Links to online items to discuss
- ☐ Agenda topics
    - Welcome
    - Ice breaker or check-in
    - Topics to discuss
    - Decisions to make
    - Next steps
    - Next meeting

Actions to take before the meeting:

- ☐ Schedule the meeting date and time
- ☐ Arrange a location or set up the virtual meeting on Zoom, Teams, Google Meet, etc.
- ☐ Invite participants
- ☐ Share the agenda with all participants
- ☐ Assign a person to take notes or set up an online notetaker

DURING THE MEETING

- ☐ Follow the agenda and watch the time
- ☐ Take notes, especially assignments, decisions, and agreements
- ☐ Make a list of follow-up actions with the name of the person responsible
- ☐ Schedule or confirm the next meeting

AFTER THE MEETING

- ☐ Compile and send out meeting notes
    - Make sure people know which follow-up actions they are responsible for