|  | WORKSHEET Meeting Planning |
| --- | --- |
|  | PURPOSE  This tool identifies the key steps you should complete to plan an efficient meeting.  When to Use  Use this tool to plan an efficient meeting.  Who Uses  Co-leads.  How to Use  Review this list before your next meeting and answer the questions on the list. Make sure you have carefully planned and prepared for all items on the list. |
|  | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Purpose of the Meeting | | | | | | | |  | | | | | | | | Today’s Meeting Deliverables and Outcomes | | | | | | | |  | | | | | | | | Number of Participants |  | Do they need to be introduced? |  | Yes |  | No |  |  | | --- | | What topics or activities must be included on the agenda to accomplish meeting objectives? | |  | | For each agenda item: who will lead it, what process will be used, and how long will it take to complete? | |  | | How much meeting time will the team reasonably need to complete the work? | |  | | If agenda items must be eliminated, how might they be handled in other ways? | |  | | Will it be necessary to connect with stakeholders or ad hoc members, or to invite them to participate in this meeting? | |  | | How will you balance co-lead responsibilities during the meeting? | |  | | What could go wrong at the meeting? (Possible considerations: interpersonal conflicts, cynicism, lack of energy, overwhelming task, inability to achieve closure, lack of skills, and so on.) For each possible issue, also identify strategies to overcome it. | |  | | What background information, parameters, or constraints do team members need to know about? | |  | | What are the key questions that need to be answered to arrive at the outcome or deliverable the team will be seeking? | |  | |