

# Meeting Flowchart Checklist

## Step 1: Prepare for the meeting in advance

- Have I decided what results I want/are needed from the meeting?
- Have I identified what type of meeting is needed?
  - Information sharing?
  - Demonstration/instruction?
  - Venting/complaining?
  - Problem solving?
  - Negotiation?
  - Coordination?
- Have I prepared an agenda?
- Have I listed things to do?
- Have I set priorities on things to do and get?
- Have I made an attendance list?
- Have I set the time and place?
- Have I notified people early enough about the purpose, time, place, length of the meeting?

## Step 2: Control the agenda during the meeting

- Have I taken care of all meeting arrangements:
  - Audio-visual, etc. (flipchart, markers, tape, etc.)?
  - Handouts?
  - Introductions, if needed?
  - Breaks/refreshments?
  - Other?
- Have I restated the purpose and objectives of the meeting?
- Have I created/reviewed the agenda?
- Have I assigned someone to take notes?
- Have I controlled the agenda during the meeting?
- Have I summarized the discussion and recapped the major points and commitments made?
- Do I have understanding and agreement on my stated purpose and meeting objectives?

### **Step 3: Record and document action assignments**

- ❑ Have all major decisions made in the meeting been recorded?
- ❑ Have I reviewed the notes of the meeting to make sure they are complete and accurate?
- ❑ Do the meeting notes show who is responsible to carry out each decision, and by when?
- ❑ Have the notes been converted to “action assignments” and typed up?
- ❑ Have the minutes been given to all persons involved (attendees and others?)

### **Step 4: Follow up action assignments**

- ❑ Have I delegated someone to follow up action assignments?
- ❑ Have I put my own commitments and action assignments on my calendar or ‘to do’ list?
- ❑ Did I inform my boss about the meeting and its results, either in person or in writing?