

MEETING MASTER CHECKLIST

Your Go-To Guide for Running Smooth, Efficient Meetings Every Time

Are you ready to run meetings that people actually enjoy? Whether you're leading a brainstorming session, team meeting, or client update, this checklist will help you keep things on track, engaging, and efficient.

1. SET CLEAR GOALS

Before your meeting, get crystal clear on what you want to accomplish. Setting goals ensures everyone stays focused and leaves with a sense of direction.

- Define the purpose: What's the outcome you want? (decisions, brainstorming, updates, etc.)
- Identify action items: What specific tasks need to be completed?
- Limit the scope: What should NOT be covered in this meeting?

2. CREATE A KILLER AGENDA

A well-structured agenda is key to a successful meeting. It keeps things on track and ensures everyone knows what to expect.

- List topics to discuss: Prioritize them based on importance and time needed.
- Allocate time for each topic: Keep it tight—don't allow one topic to steal the show.
- Share the agenda in advance: Give everyone enough time to prepare and contribute.

3. INVITE THE RIGHT PEOPLE

Invite only those who need to be there. The right participants ensure diverse perspectives and more effective discussions.

- Keep it relevant: Invite those who are directly involved in the topics.
- Respect everyone's time: Don't invite people who don't need to be there.
- Allow for optional participation: If someone's input is optional, let them attend if they're interested.

4. MANAGE TIME LIKE A PRO

Respect everyone's time by keeping the meeting on track and avoiding overruns.

- Start and end on time: Stick to the agenda, even if it means skipping less important discussions.
- Use a timer: Set time limits for each agenda item and stick to them.
- Don't let side conversations take over: Keep the focus on the main discussion.

5. KEEP IT ENGAGING

Nobody wants to sit through a monotonous meeting. Keep your team engaged by being interactive.

- Ask questions: Encourage participation from all attendees.
- Mix things up: Incorporate visual aids, whiteboards, or polls to keep things lively.
- Celebrate small wins: Acknowledge successes and contributions, no matter how small.

6. TAKE CLEAR NOTES AND ASSIGN ACTION ITEMS

Make sure everyone knows what's expected after the meeting. Action items keep the momentum going.

- Assign responsibilities: Who is doing what and by when? Be specific.
- Note decisions made: Ensure everyone is aligned on what was decided.
- Summarize key takeaways: Ensure there's clarity on next steps and timelines.

7. FOLLOW UP AFTER THE MEETING

Don't let the meeting fade into oblivion. Following up ensures accountability and keeps projects moving forward.

- Send out meeting minutes: Share the action items and decisions with everyone involved.
- Check in on progress: Review action items in your next meeting or via email.
- Keep the communication flowing: Use project management tools or follow-up emails to ensure tasks are completed on time.

BONUS TIP: KEEP IT FUN

A meeting doesn't have to be all business—sometimes a little bit of humor, an icebreaker, or a quick team-building activity can make a big difference. A fun meeting is a productive meeting!