|  | WORKSHEETMeeting Planning |
| --- | --- |
|  | PURPOSEThis tool identifies the key steps you should complete to plan an efficient meeting.When to UseUse this tool to plan an efficient meeting.Who UsesCo-leads.How to UseReview 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? |
|  |

 |