

Pre-Meeting Checklist

- ☐ 1. Form a planning committee
- ☐ 2. Set a clear agenda and timeline
- ☐ 3. Identify goals, scope, and objectives
- ☐ 4. Assign roles and responsibilities
- ☐ 5. Prepare necessary resources and materials
- ☐ 6. Send out meeting invitations and an agenda
- ☐ 7. Confirm attendance of key stakeholders

Post-Meeting Checklist

- ☐ 1. Capture deliverables and action items
- ☐ 2. Assign tasks to specific individuals
- ☐ 3. Set deadlines for completion
- ☐ 4. Distribute meeting notes and follow-up actions
- ☐ 5. Schedule follow-up meetings and check-ins
- ☐ 6. Monitor progress and address any issues