

Meeting Plan Worksheet (An *Infoline* Job Aid)

Instructions

We've all been to meetings that have been a waste of everyone's time. Don't be guilty of conducting a useless session. This job aid prepares you and your attendees to have a productive meeting. Use this worksheet to determine if you need to meet, who needs to attend, who needs to do what, what equipment is needed, and what needs to get accomplished. With this job aid, your attendees will come to meetings prepared and ready to get the job done.

For more information on planning productive meetings, see *Infoline* No. 250505, "Meetings That Work." Click [here](#) to purchase that issue.

Job Aid

Planning Your Meeting: A Worksheet (continued)

Who Needs to Do What?

Now that you have decided whom to invite to the meeting, determine if you need someone to carry out any specific tasks in the meeting, such as presenting information or coming up with some preliminary ideas. Also identify who you want to carry out the roles of timekeeper, facilitator, and notetaker.

Task or Role	Name
Timekeeper	
Facilitator	
Notetaker	

What Facilities or Equipment Are Needed?

To identify the facilities and equipment you might need, answer the following questions:

- Do you have a space that's big enough to comfortably accommodate all the participants?
- Do you need any special seating arrangements?
- Is the meeting going to take long enough to require breaks or refreshments? Should you go off site?
- How are you planning to deliver information or have notes taken?
- Is the equipment that you need to deliver information available in the room or facilities that you have chosen?

What Needs to Get Done?

The last component in planning your meeting is determining what is going to happen. To identify the right agenda items in the right quantity (not too many, not too few), answer the following questions:

- What has to happen to accomplish your objective?
- What is the most important outcome you want from the meeting?
- If meeting time were cut in half for some reason, what would be the first thing removed from the agenda?
- If this is a follow-on meeting, were agenda items left from the last meeting that should be taken care of?
- During which activity are meeting participants going to commit to further action and next steps?
- Are there any minor issues that could be quickly cleared up during this meeting?

Now, list the activities. Mark each activity high priority (H) or low (L). You may still want to keep low-priority activities on your agenda, but you will know where to spend more or less time. If possible, go through high-priority activities first both to capitalize on the energy of the group and to ensure that you cover them.

Activity	Priority (H/L)