

## Meetings – Planning & Process Worksheet

Meeting Name: \_\_\_\_\_ Date: \_\_\_\_\_ Duration: \_\_\_\_\_

PLANNING	
What goal does this impact? Short term & long term? How?	
Purpose	
Outcome (s)	
Meeting Type	
Decision Type	
Agenda (see other page)	
Emotional tone & plan	
Location & logistics	
Participants	
When should thinking and planning be done? By whom?	
Where is the accountability (what/who)?	

<b>PREP</b>	
Prep work – chair -plan to start, stay & end on time -plan for what ifs -plan for difficult participants -plan for strong open & close -plan for group dynamics	
Prep work – participants; due dates & format	
<b>MEETING</b>	
<b>FOLLOW UP</b>	
How will you follow up? With whom? When? Who drives the follow up?	
Who will do minutes? How will they be distributed?	
<b>OTHER CONSIDERATIONS</b>	
Will others be running parts of the meeting? How will you prepare with them?	
Are there other meetings connected with this one (past/future)? How will you make the links?	



## **Post Meeting Analysis**

How did the meeting go?

Did you hit your outcomes?

Did you stay on your agenda? Why/why not?

Did you finish on time? Why/why not?

Did the group function well and participate? What helped or hindered that?

Will the meeting positively impact the future? How do you know?

What will you continue to do next time?

What do you want to improve for next time?