



Smart Meeting Quick Start Guide and Checklist

Can objectives be met through telephone, e-mails, video or conference calls?

Yes

No

Meeting Agenda/Problem statement we are trying to resolve:

Pre-Meeting

Identify and Acquire Tools needed:

- IT support
- Projector
- Video/Audio
- Paper Handouts
- Guests

Meeting Date: _____

Meeting Start Time _____

Planned Meeting End Time _____

Calendar Invitations Sent Yes No

Distributed Agenda Yes No

Identified Objectives Yes No

Planned the Process Yes No

Defined roles/responsibilities Yes No

Time calls defined: _____ Yes No
(time remaining throughout meeting)

During the Meeting:

- Ice Breaker/Introduction
- Reiterate Meeting Objectives

Establish Ground Rules: _____

- Follow Meeting Agenda
- WHAT open actions remain, Who is Responsible, When is the Next Step Due:

- Establish Follow-up meeting date: _____

After the Meeting:

- Develop After-Action report
- Publish minutes

Bonus Tips for Hosting an Effective Meeting:

- Start on time
- Assign roles
- Follow the agenda
- Encourage participation
- Assign accountability
- Determine timetables
- Discuss concerns
- Summarize action items
- End on time