

Best Meeting™ Executive Checklist

12 essentials to help ensure a memorable and productive meeting

1**Select a theme.**Delegated Completed

A theme helps set the tone for your meeting, and encourages participants to think about how they can contribute. It might involve brainstorming a market penetration strategy, building support for a new policy, or creating an action plan for a new initiative. Regardless, the key is to have a theme that will have meaning for participants, and get their creative juices flowing before the meeting takes place.

2**Choose a facilitator.**Delegated Completed

It pays to identify this individual early on in the planning process and involve him or her in decisions around the agenda, whom to invite and even the location and physical layout. Make a list of the skills and experience you believe the right person should have, including an ability to build consensus and to think strategically.

3**Specify the desired outcomes.**Delegated Completed

Consider what you want from this meeting, ...the outcomes that will make it an undeniable success. Be as specific as possible, recognizing that you might want to adjust these as your planning evolves. Keep this question uppermost in your mind, *"What outcomes will cause participants to agree that the meeting was a success, and well worth the investment of time and money?"*

4**Build an agenda.**Delegated Completed

Of primary importance is achieving the outcomes you have specified for the meeting. However, it's wise to factor in the nature of your participant group. For example, an intact management team can normally move into specifics fairly early in a session, whereas participants drawn from a number of different organizations might require time to adjust, learn the ropes, understand the context, and so forth. Also, the work is important but so too is downtime to relax and recharge the batteries. Thoughtfully planned breaks, recreational periods, social events, dinners and receptions can all add to the overall value of the meeting.

5**Make a list of participants.**Delegated Completed

The answer to, "Who should be there?" might seem obvious, but it isn't always. With the sometimes conflicting goals of keeping attendance to a manageable number and ensuring that important viewpoints / positions are represented, make a list of everyone you're thinking of inviting, and then go back and check off those who absolutely have to be there, ...as a participant, a resource (an industry expert for example), or an observer. Be as selective as possible, ensuring that each attendee has a legitimate role to play.

6**Estimate the time.**Delegated Completed

How much time will be required to achieve the desired outcomes? Part of a day? A full day? Two or three days? More? If you think some participants will be hard pressed to commit to the required time, consider dividing the meeting into segments held a week or two apart.

7 Decide what to document and how. Delegated Completed

Decide on the documentation you'd like and how it will be done. Will it be handled by an administrative person, a participant, someone recruited specifically for the purpose, or the facilitator? If it's going to be someone other than the facilitator or a participant, make sure he or she has some understanding of the subject and the terminology. It is very disappointing to discover that the documenter missed the underlying ideas and failed to note many of the high points due to a lack of familiarity with the subject matter.

8 Assemble and distribute briefing materials. Delegated Completed

Identify the materials you'd like participants to review prior to the session—an article, book summary or extract, economic forecast, environmental assessment, industry outlook, or organization-specific material like research, divisional plans and marketing collateral. Try to get these materials into the hands of participants at least two weeks prior to the meeting.

9 Identify research requirements. Delegated Completed

If research is required (for example, a survey or key informant interviews), make sure it is spec'd, awarded and completed in time to get information into the hands of participants. Some outside facilitators will handle this for you; others will not. Make sure that the individual is qualified to take it on.

10 Plan the introductory remarks. Delegated Completed

Ensure that participants are welcomed, expectations around outcomes are reviewed and the ground rules for things like the scope and nature of the conversation are clearly set out. A little time spent clarifying these items upfront will pay off handsomely in more of the right kind of conversation.

11 Appoint a coordinator. Delegated Completed

Designate a person to handle the logistics. These include booking a suitable location, arranging for meals, social and recreational events, ensuring the room is properly set up, and getting out invitations and briefing materials. There are typically a lot of details, like the availability of printing, copying, a wireless network, high-speed internet access, catering, and so forth.

12 Select a location and room configuration. Delegated Completed

Will the meeting be held at your offices? Offsite in a nearby facility? Out of town? Consider things like convenience, cost, and impact on your participants and the conversation. Would the meeting benefit from an out-of-town location? Work with the facilitator to ensure the meeting room is configured in the best way possible. Options include an open 'U', boardroom table, rounds, and so forth.

Need help pulling it all together? Looking for an experienced facilitator who will contribute to the success of your meeting, workshop or retreat. Contact Bob McCulloch or Chris Ward:

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