

# 1

## PRE MEETING CHECKLIST

- Time, duration, place, attendees confirmed
- Agenda finalized and forwarded
- Materials printed/emailed/shipped
- Collaboration with colleagues restating goals and highlighting important items
- Review bios/intros with colleagues
- Presentation annotated with table setting notes and other reminders
- Identification of important next steps
- Getting in the zone techniques (visualization, physical warm up, mental focus)

# 2

## AGENDA CHECKLIST

- Date/Time
- Duration
- Location
- Attendees
- Key discussion topics
- Potential topics of interest
- Housekeeping items

# 3

## TABLE SETTING CHECKLIST

- Introductions
- Duration
- Agenda items
- Other potential agenda items or issues
- Kick-off

# 4

## POST MEETING & FOLLOW UP

- Did the meeting achieve its goal?
- On a scale of 1-5 how would the attendees rate the meeting?
- How would you rate your own performance?
- What went well and what could be improved (time management, engagement, questions, story telling, materials, team work)?
- What are the follow up items or next steps?
- Call report