

# Meeting Planner

## First of all, why are you meeting?

*We're meeting because:*

Now, dig deeper. If your answer was “because we always have a weekly team meeting”, think about the **purpose** of the meeting. What’s the big picture - the mission or vision of your team, your department, your organization? How will this meeting help the team move towards the mission? Now write your answer here:

*The purpose of this meeting is:*

Next, break this down into smaller (but still important) parts. List 3-5 goals, outcomes, or achievements that you would be thrilled to see happen as a result of the meeting:

*The goals of this meeting are:*

## Pre-Meeting Checklist

Use this checklist to make sure you cover all the bases to give your meeting a solid structure:

- \* Purpose
- \* Goals/Outcomes
- \* Participant List
- \* Date/Time
- \* Duration
- \* Location
- \* Guest(s) - speaker, expert, VIP
- \* Resources/Materials/Equipment
- \* Refreshments
- \* Detailed Agenda
- \* Note-taker/Minute-taker
- \* Structure for Notes/Minutes
- \* Follow-up plan



# Meeting Agenda Template

- \* Meeting Title:
- \* Attendee List: *(names of all who were invited)*
- \* Guests or Speakers: *(if applicable)*
- \* Date & Time: *(include start and end times)*
- \* Location:
- \* Purpose/Goals/Outcomes for Meeting:
- \* Review of minutes/ notes from previous meeting:
- \* Requests for additions to the agenda:
- \* Topics for discussion: *(complete details below, adding topics as needed)*

Item	Presenter/Speaker	Time Allotted
Topic 1		
- Detail 1		
- Detail 2		
- Detail 3		
Topic 2		
- Detail 1		
- Detail 2		
- Detail 3		
Topic 3		
- Detail 1		
- Detail 2		
- Detail 3		



# Meeting Minutes Template

- \* Meeting Title:
- \* Attendee List: *(names people who actually attended)*
- \* Guests or Speakers: *(if applicable)*
- \* Date & Time: *(actual start and end times)*
- \* Location:
- \* Purpose/Goals/Outcomes for Meeting:
- \* Summary of discussions and action items: *(use format shown below, adding topics as needed)*

Topic 1 (repeat this format for each topic)		
Insert topic and name of person who introduced the topic here:		
Insert a summary of the key points of the discussion here:	Decisions	Provide details of decisions that were made
	Actions needed	List action that needs to be taken
	Responsibility	Give names of person or people responsible for taking action
	Due date	The date when actions are to be completed or reported on