

# The must-have meeting management checklist

Room booking best practices to up-level the

## Before the meeting

- Simplify the in-room technology and set-up**  
Make sure meeting rooms are 'plug-and-play.'
- Survey employees on how they use conference rooms**  
Ask them for feedback on what tools they need and why.
- Review and consider responses**  
Remove complex equipment and processes that require a manual to operate.
- Prepare an agenda**  
Craft an agenda ahead of time to figure out if the meeting needs to take place at all.
- Decide how to spend the time**  
Write out how you'll spend the meeting time, and include the topics to cover and any major goals.
- Prioritize what has to be discussed**  
Go through and create action items with specific time allocations for discussion to help keep things moving and on track.
- Determine how much time is needed to meet**  
Can it be done in 30 minutes instead of an hour? Go through and make sure that you don't over-schedule.
- Take stock of meeting attendees**  
Determine key decision makers that should be there, and invite them.
- Decide who will record meeting notes**  
Notate this in the agenda.
- Send out invitations**  
There are people that don't need to present, but might like to be. Mark these folks as optional in your meeting invite.
- Video conferencing**  
Add a video conferencing link to the meeting invitation if it needs to be recorded, or for remote attendees to participate.

- Double check time zones**  
If meeting attendees are in different time zones, make sure the invite clearly reflects this.
  - Set automatic notification reminders**  
Depending on how far out the meeting is, or if it's recurring, remind attendees the week, day, or hour before.
  - Share the meeting agenda**  
If possible, send out the meeting agenda at least 24 hours in advance.
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## During the meeting

- Begin on time**  
Start the meeting when it's scheduled.
- Arrive early**  
Arrive a few minutes early to your meeting room.
- Get video conferencing up and running first**  
Does your meeting include remote attendees who are calling in? Double check that any video conferencing links work.
- Go over the agenda**  
Begin by briefly going over the agenda to make sure everyone is on the same page with the schedule and topics of the meeting.
- Record meeting notes and action items**  
An easy way to do so is within the agenda itself. Delegate follow-up.
- Don't derail your agenda**  
Note items that need to be further discussed or actions to take afterwards.
- Tag action items with the person responsible for follow-up**  
This holds people accountable for what was discussed so they know how they are expected to contribute to keep projects on track.
- Conclude the meeting on time**  
End your meeting on-time--every time.
- Thank meeting attendees**  
Be sure to thank all participants for their time and communicate that you will send follow-up email with the meeting notes.
- Stop any video recording**  
Disconnect the call for any remote folks.
- End the meeting early**  
If the meeting happens to wrap-up ahead of schedule, do your coworkers a solid, and release the room. This is not only a best practice, it's a courteous gesture your colleagues will thank you for.

**Leave the room clean**

Clear personal items like water glasses and remind people to take all of their belongings with them.

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## After the meeting

**Look over the meeting notes**

Make sure all next steps are clear and assigned.

**Email out the notes**

Share the meeting notes with all invitees, those who attended and optional team members, in an email.

**Set a date for a follow-up meeting**

If necessary, also note that an agenda will follow.

**Ask for feedback**

Poll meeting participants' via an email or a simple survey.

**Decide what outcomes to share out**

Decide what should be shared with the rest of your team, organization, or the entire company, and how.