

RYAN LATTA & ASSOCIATES

MEETING CHECKLIST

Making your next meeting even better

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BEFORE THE MEETING

CAREFUL PREPARATION

- Interview with meeting sponsor
- Design a Purpose statement
- Confirm purpose resonates with attendees
- Find a room with desired layout
- Interview key attendees
- Develop agenda to accomplish purpose
- Gather materials
- Update invitations

Preparation rule of thumb-
It takes 2x as long as the meeting

*Need help with facilitation?
Email ryan@ryanlatta.com*

DURING THE MEETING

STRUCTURE & ENVIRONMENT

- Confirm purpose
- Develop working agreements
- Confirm agenda
- Take 5-10 minute breaks every 45 min
- Use breaks to adjust agenda
- Debrief after activities
- Collect off-topics in parking lot
- End with action item list
- End with parking lot
- Close by testing if the purpose was achieved

Collaboration Explained by Jean Tabaka is a great resource



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AFTER THE MEETING

FEEDBACK & FOLLOW- THROUGH

- Touch base with key attendees
- Seek feedback as facilitator
- Send written notes as needed
- Debrief sponsor and informed groups
- Reflect on your facilitation and feedback

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