

Meeting Preparation Checklist

Tool for preparing your next client meeting.

- Identify the purpose of the meeting
- Make sure you really need the meeting
- Develop a preliminary agenda
- Select the right participants
- Do attendees need to be prepared to present anything?
- Confirm space availability for in-person meetings
- Send meeting invitation
- If decisions need to be made during the meeting, what process will be used
- Identify, arrange for, and test any equipment needed
- Finalize agenda and distribute to attendees
- Verify that key participants will be in attendance
- Prepare yourself (presentation, printout, etc)