



# meeting CHECKLIST

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THE important question before planning a meeting:  
**SHOULD I REALLY HAVE A MEETING?** Yes if:

1

I have a problem that I cannot solve alone  
and I need help to get my work done.

2

I cannot solve my problem in another way: email or phone call.

3

I need to generate ideas to solve a problem.

4

Decisions must be taken with my colleagues or partners.

5

We need to establish common guidelines for a project.

6

I have to share sensitive or specific information  
that will generate questions and that must be answered quickly.

**YES... Let's plan a meeting!**





# BEFORE THE MEETING

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THE AGENDA



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# AGENDA

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- Basic Information
  - Date
  - Address
  - Start Time
  - Room
  - End Time
- Meeting Type
  - Brainstorming
  - 1-to-1
  - Board
  - Project
  - Recurrent
  - Interview (HR)
  - Scrum
  - Committee
  - Informative
  - Weekly
  - Training
  - Stand up
  - Executive
  - Walking Meeting
  - Monthly
- The Main Objective:

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  - Inform
  - Exchange
  - Generate Ideas
  - Consulte
  - Decide
- Topics
  - Each topic objective
  - Person in-charge of each topic
  - Each topic length
- Plan breaks if necessary
- Attach important documents *(report, images, URL, etc.)*
- Preliminary sending to targeted participants *(Approval, addition or modification)*
- Sharing the agenda to all *(Ideally 2-3 days before; everyone will be well-prepared)*

# PARTICIPANTS

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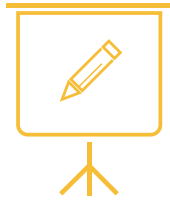


- Invite relevant participants *(Who do I invite to achieve the results?)*
- Define participant roles
  - Leader
  - Guest
  - Partners
  - Note taker
  - Participants
  - Timekeeper



# PREPARE MY PRESENTATION

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- Use a presentation tool (*PowerPoint, Canva, Prezi or other*)
- Prepare my speech in relation to the objective and the topics set on the agenda
- Anticipate questions and answer them

# AS SOON AS POSSIBLE

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- Book the meeting room
- Book all technological devices you need
- Order food/drink
- Confirm the attendance of all participants

# A FEW MINUTES BEFORE

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- Arrive before the estimated time (*Ideally 5 to 15 minutes before*)
- Set up the meeting room
- All technological devices are up and running
  - Projector
  - Computer
  - Software
- Bring paper/pencil/device





# DURING THE MEETING

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THE PROCESS



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## DURING THE MEETING

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- Start on time
- Confirm the agenda reception and reading
- Confirm roles
- Respect of time
- Respect of the agenda
- Back on the actions to take
- Follow-up on current tasks
- Assign tasks
- Take notes on decisions taken

## AT THE END OF THE MEETING

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- Last 5 minutes: Summary
- Determine the date of the next meeting
- Rate the meeting
- Provide helpful feedback





# AFTER THE MEETING

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THE MINUTES OF MEETING

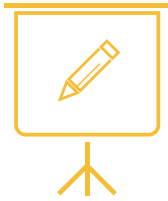


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# MINUTES OF MEETING

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- Basic Information
  - Date
  - Meeting Length
  - Address
  - Room
- Attendees and absents list
- Indicate the main objective 

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  - Inform
  - Exchange
  - Generate Ideas
  - Consult
  - Decide
- Summarize each topic on the agenda
- List the tasks assigned during the meeting
  - Responsible
  - Due Date
  - Priority Level
- Indicate the decisions taken
- Attach the necessary documents (*Report, image, URL, etc.*)
- Send the minutes of meeting by email
- Communicate important decisions to whomever
- Date and place of the next meeting

# FOLLOW-UP

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- Tasks follow up
  - Statuts
    - Not Started
    - In Progress
    - Put on Hold
    - Cancelled
    - Completed





## MEETING MANAGEMENT SOLUTION FOR EFFICIENT TEAMS



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**Let's have some structured meetings!**

Own your meetings,  
from agenda to minutes

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