

Task	Assigned to	Due date
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Planning

- Create plan in project management software (if applicable)
- Hold internal meeting to plan and assign tasks
- Develop budget (if applicable)

Logistics

- Confirm meeting time and location with product manager
- Invite team (Internal, client attendees)
- Secure meeting room, AV, at meeting site
- Arrange for lunch/refreshments (noting any nutritional restrictions)
- Print meeting materials (e.g. agenda, presentation, evaluation, tent cards, etc.)
- Assign a note taker/record meeting

Agenda

- Develop draft agenda (e.g. introductions, background, project purpose, scope, plan, roles, collaboration, questions, next steps)
- Send draft agenda to relevant individuals for review
- Revise draft agenda based on feedback (as needed)
- Finalize agenda (e.g. design, copy edit, spelling, content, etc.)
- Send agenda to attendees in advance of the meeting

Presentation

- Research background information (e.g. literature search, product monographs, guidelines, company information, condition, etc.)
- Develop draft presentation (e.g. PPT template, content)
- Send draft presentation for review to relevant individuals for review
- Revise draft presentation based on feedback (as needed)
- Finalize presentation (e.g. design, copy edit, spelling, content, etc.)
- Send presentation to attendees in advance of the meeting (if required)
- Practice presentation delivery (ideally to team members)

Meeting

- Prepare meeting room (e.g. lay out materials, test AV, Wi-Fi, set up refreshments, locate bathrooms, etc.)
- Welcome meeting participants
- Deliver an incredible presentation
- Participant Q&A
- Ask participants to complete post-meeting evaluation
- Debrief with colleagues
- Clean up meeting room

Meeting Follow-up

- Compile meeting notes and create summary (including next steps, key milestones, deadlines, etc.)
- Distribute summary
- Assign tasks
- Update project plan

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