

## **Checklist and Tips for Running a Successful Meeting**

### ***Before: Meeting Preparation***

- Choose a meeting schedule, determined by your project timeline
- Book and confirm a meeting room
- Establish regular communication with team members to:
  - Notify team of meetings
  - Confirm attendance in writing
  - Copy appropriate leadership (quality/medical directors) on team communications
- Draft and send agenda for team input
- Finalize agenda
- Invite non-team members to join or present at the meeting if relevant
- Send meeting reminder the day before
- Reconfirm room
- Review presentation materials
- Copy handouts

### ***During: Running the Meeting***

- Take attendance at meeting
- Conduct introductions and describe meeting objectives
- Review previous meeting minutes
- Stick to your meeting timeline (ensure time-keeper is doing this)
- Take meeting minutes (ensure note-taker is doing this)
- Report on previous action items and present relevant data/information
- Engage in brainstorming – no idea is a bad idea!
- Consider PDSA cycle(s) to undertake
- Ensure all proposed solutions are backed by data
- Develop action items and a timeframe
- Assign next steps to team members
- Confirm meeting membership
- Review next steps and assignments due before next meeting
- Address questions regarding next steps/assignments
- Communicate future meeting dates

### ***After: Meeting Follow-up***

- Send meeting minutes and get input from team
- Send final copy of minutes to appropriate leadership
- Thank team members for their time
- Check-in with team prior to next meeting on progress of next steps and assignments
- Remind team about next meeting
- Begin preparation for future meetings

### ***Pre-Meeting Considerations:***

*What items and materials will you need for this meeting (i.e. flipchart, dry-erase board)?*

*What are your information technology (IT) needs? If you are using PowerPoint do you have the appropriate setup and equipment?*

### ***Meeting Considerations:***

*Determine roles of team members and assign each a task. At a minimum, you should have a:*

*-Note-taker*

*-Time-keeper*

*-Facilitator*

*Keep a running attendance sheet from meeting to meeting.*

*Caution against developing solutions before collecting data.*

### ***Post-Meeting Considerations:***

*Evaluate the meeting: What did the team do well? What should the team do differently to improve future meetings?*

*Disseminate meeting minutes no more than one week after the meeting.*

*Prepare the next meeting agenda with input from the team.*

*Follow-up promptly with team members to ensure next steps and deliverables are met.*