

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.