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| **Week 3 RESOURCES** |
| *Meeting Planner’s Checklist* |
| *Use this checklist to be sure that you have covered all the important steps in preparing for an effective meeting.* |
| **Have You:** | **Yes** | **No** | **Notes** |
| **1.** Identified the purpose of the meeting? |  |  |  |
| **2.** Identified the objectives of the meeting? |  |  |  |
| **3.** Selected the participants and identified roles? |  |  |  |
| **4.** Identified the decision-making process *(e.g., group leader, attendees, another manager)*? |  |  |  |
| **5.** Decided where and when to hold the meeting and confirmed availability of the space? |  |  |  |
| **6.** Identified and confirmed availability of any needed equipment? |  |  |  |
| **7.** Notified participants of when and where the meeting will be held? |  |  |  |
| **8.** Developed a preliminary agenda with purpose and objectives? |  |  |  |
| **9.** Sent preliminary agenda to key participants and other stakeholders to sound them out in advance? |  |  |  |
| **10.** Finalized the agenda and distributed it to all participants? |  |  |  |
| **11.** Sent any reports or items needing preparation to participants? |  |  |  |
| **12.** Verified that all key people will attend? |  |  |  |
| **13.** Prepared yourself *(e.g., handouts, overheads, etc.)*? |  |  |  |
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