

MEETING CHECKLIST

How To Host Stellar Meetings From Your Boardroom To Conference Calls

Make sure you're prepared for your meeting! This checklist has everything you need to make your meetings productive and efficient, whether held by teleconference, by web or in person. We've got you covered!

3 Days or More Before Your Meeting

Set An Agenda

An agenda keeps everybody on topic and focused, so you'll be less likely to run into "overtime". An agenda should be a staple part of your meeting invitations, sent at least 3 days in advance, and include the following:

- The objective/ goal/ purpose of the meeting
- A list of topics in order of priority, from most important to least
- Time allocated to each topic
- Topic leader - who is going to lead the discussion?

TIP!

Write topics in the form of a question. This will encourage your meeting participants to think about the topic at hand before the meeting in preparation for the discussion.

Send Invitations

Now that your agenda is ready, go ahead and send the invitations. Make sure your invitations include the following:

- A concise subject line that includes meeting name, date and type of invitation
- Meeting date/time & length
- Purpose of the meeting
- Detailed Agenda Outlined above
- Any work that needs to be done prior to the call
- Any supporting documents
- Attendees - consider who REALLY needs to be in the meeting to achieve your objective
- Clear details on where the meeting will take place, such as address, meeting room #/name, Online Meeting Room URL, Dial-In(s), Access Code/ PIN and instructions



TIP!

Have you checked that your meeting room has all the technical requirements that you need in advance, such as video, WIFI, conferencing capabilities, etc? It's much better to make this confirmation in advance rather than finding out right before your meeting.

1-3 Hours Before Your Meeting

Set-Up

Make sure you have everything set up and ready to go by the time your meeting starts. It's frustrating for everyone when the session isn't running smoothly and efficiently.

- Open any visual cues, like slides/notes/web pages on screen in separate windows or tabs.
- Print spare copies of notes, documents or reference materials.
- Check for any noises or distractions that could interrupt your meeting.

TIP!

Want better attendance? Send out reminders! Did you know FreeConference.com automatically sends reminders 15 mins before your meeting?



Familiarize & Test Technology

If you're working with technology for the meeting, like FreeConference.com, you'll want to familiarize yourself with the different features and functions, perhaps even conducting a brief test session with some friends or colleagues.

- Test video, audio, and screen sharing.
- Review your default settings; FreeConference.com has settings that control entry/exit chimes, name announce, waiting room music, and three mass muting modes. Make sure that you have selected the settings that you prefer.
- Print out any instructions that you might need to manage the call, like keypad moderator controls and start/stop recording.
- Have a backup plan ready to go in case of emergency.

Get your callers covered! By adding access to toll-free 800 number, you can ensure that your callers not incur any phone fees for the call and will be able to enjoy a crystal-clear phone connection.

During Your Meeting

Start Your Meeting Off Right

Once the meeting has begun, it is your responsibility to manage your participants and keep the meeting on schedule. Don't be afraid to remind people to stay focused on the task at hand or ask them to move on if they have been stuck on a topic for too long.

- Ensure everyone has received and/or reviewed important documents.
- If recording the meeting, announce that it will be recorded and begin.
- Use the necessary moderator mode/muting controls to eliminate any attendee background noise.

TIP!

If meeting in a virtual space, it's a good idea to keep attendees muted as much as possible until they have comments to add, which will also help if the session is being recorded.

- Use Screen Sharing to show a document or application, so all participants can follow along together.
- Appoint the meeting minute taker, if it hasn't already been done.
- Start with a brief introduction, clearly stating objectives.
- Run through the agenda.

TIP!

Share your document with your participants directly by uploading them to the conference window.

Facilitating The Discussion

- Stay on topic and on time; the leader is responsible for reigning in distractions and keeping everyone on topic.

TIP!

Drop-off topic discussion into the "Parking Lot" to address later and to stay on track.

- Keep an ear out for any audio issues: you may need to mute participants partway through the call if they have a lot of echoing or background noise.
- Take notes of any decisions that have been made. Even though there is an appointed note taker, it's good practice to keep note of those details.
- Call on the quiet ones for their input. Some people simply need a little push, but might have some great insight.

TIP!

Use FreeConference Q&A mode for larger audiences, which allows people to raise their hand to speak so you know when to unmute specific callers, to keep the lines clear.

After Your Meeting

Follow-Up With Meeting Minutes And Takeaways

After the session ends, the designated party should type up and send out meeting notes for others to peruse at their convenience.

- Distribute minutes of the meeting to all participants.
- Include key takeaways including any follow-up tasks, responsibilities and deadlines.

TIP!

If the meeting was recorded, consider having the MP3 transcribed to distribute to others.

Be prepared! Keep this list handy for your next meeting.

FreeConference.com is the original free conference calling service. Founded in 2000, now offering an extensive set of free audio and web conferencing features, FreeConference.com is committed to providing reliable and affordable tools for gathering groups of every size, no matter their location, quickly, conveniently, and without restrictions.

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