



Meeting Preparation

The proper preparation will augment your ability to add value in the meetings you attend. Conduct the following activities if you are given any lead time to meetings.

	Develop Context	Conduct Research	Prep Documentation
Questions to Ask Yourself	<ul style="list-style-type: none">• Why is this meeting being held?• What do you know about the people, process, and technology related to this meeting?	<ul style="list-style-type: none">• What materials exist that would provide insight into this meeting?• Who are the key players that need to be present?	<ul style="list-style-type: none">• What do you expect or hope to happen in the meeting?• What value can you add before, during, and after the meeting?
Things You Can Do Immediately	<ul style="list-style-type: none">• Ask to have the meeting invite sent or forwarded to you• Review the meeting invite, agenda and the people involved• Determine your level of understanding of the meeting (low, medium, or high)	<ul style="list-style-type: none">• Study any documents attached to the meeting invite• Research the people involved. Learn their area of responsibility and position in the organization• Search for additional materials to study related to the project (e.g., RACI)	<ul style="list-style-type: none">• Try to determine what decisions and action items will occur in the meeting• Try to guess which person is responsible for those items• Update the meeting notes template with attendees

Use your manager as a resource to fill your knowledge gaps and use our toolkit to support your documentation.



Project Documentation

Meeting Notes: Consistent and well-documented notes supports the progress and accountability needed in every project.

MEETING NAME			
Meeting Place:		Date:	MM/DD/YY
Conference Line:		Start – End Time:	00:00 – 00:00
Facilitator(s):			
Participants:			
Agenda:		Documents to Review:	
1. <Agenda Item>		1. <Document Name>	
2. <Agenda Item>		2. <Document Name>	
3. <Agenda Item>			
4. <Agenda Item>			
Discussion and Meeting Notes:			
<ul style="list-style-type: none"> • Bullet Notes <ul style="list-style-type: none"> ○ Sub-bullet • Bullet Notes <ul style="list-style-type: none"> ○ Sub-bullet 			
Decisions:			
<ul style="list-style-type: none"> • Bullet Notes 			
Action Items:			
ID	Description	Owner	Due Date
A1			
A2			
A3			

Summary Section

- This section is mostly logistical and should be populated prior to the meeting
- Utilize the participants section to document who actually attended the meeting

Agenda Items

- Keep it short and high-level

Meeting Notes

- Summarize key elements discussed in the meeting
- Be sure to capture all decisions and action items that are made

Decisions

- Document any type of decisions that are agreed upon in the meeting

Action Items

- All items in this section are required. Follow-up with your manager or responsible owners to verify content and due dates

Review your draft notes with your manager prior to publishing to the larger group. Meeting Minutes Template is located in your toolkit.