

One simple Improvement saves thousands of lives and billions of dollars. Think what it can do for your meetings.

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We all know that checklists are widely used in settings where the outcome is critical (aviation, power plants, medicine or military operations). What we might not know is that the use of checklists has been proven useful in widely different situations. In as different environments as production floors, day care centers and political campaigns checklists play a prominent role.

The idea is simple: Design a meeting checklist, distribute, post and use it. Here are a few tried and true simple rules to make it work best.

- The list should be on a single side of paper. Use large font that is easy to read.
- The most effective checklists are short and quickly completed. Many can be run through in under a minute.
- They would typically have 7-10 or so items on them.
- Post them and use them!

A checklist is simply a reminder system. It consists of things that you already know (hopefully) but might forget for a particular event. The checklist keeps the practices that make a successful event (like a meeting) right there in front of you. That way even if you are tired, have a headache or are preoccupied you won't miss something important.

You can also use the checklist to remind yourself to try new ideas, techniques or practices. For example you could rotate items into the list that you would like to try out (such as some of the more unusual the items in the more complete meeting idea list in the E-book [Meeting Improvement Idea Book](#) (See below).

The power of the checklist is in the execution. It only has positive effect if we use it!

The items could be divided up into sub-checklists in relation to timing to the meeting such as checklist for: days before the meeting, right before, during, right after and after the meeting. If you follow the aviation example each step in flying (preflight, landing, etc.) have different checklists.

For our purposes we can keep the meeting checklist as simple as we possibly can. These are living documents. We do want the checklists to grow smarter over time. They get smarter by incorporating new issues that occur and removing old issues that no longer occur.

You can start with this one and adapt to your type and style of meetings.

Meeting Checklist		Title of Meeting:	
Purpose of Meeting:			
Date:		Facility:	Ad hoc? Scheduled
Done	When	Idea to improve meeting	
	Few Days before meeting	Have agenda sent out well before meeting with meeting day, time, location objective and topics	
	Few Days before meeting <u>and</u> maybe the day before the meeting	Possibly as part of the agenda remind people who have promised to complete some work for the meeting. The reminder should be at the top of the communication (like the email) and made bold so it is very hard to miss.	
	10-20 minutes before meeting	Check that: <ul style="list-style-type: none"> • Room is actually available. • Check to see if the room is clean, • Easel has paper (if needed), white board is there, with markers, • Any other aids (like pens and pads) 	
	10-20 minutes before meeting	<ul style="list-style-type: none"> • Check out the AV before the meeting. Verify connections (Laptop to LCD projectors) and thumb drives are useable on the computer in the conference room. • You have the latest presentations, graphs, charts • Printed materials are complete and enough are printed 	
	Just before the meeting starts	Assign (or request) someone to take minutes (that is good at it).	
	Beginning of the meeting	Have people introduce themselves and their role if people don't already know everyone	
	Beginning of the meeting	People come in the door with a variety of concerns and preoccupations. A practice is to start the meeting by asking if anyone has any concerns or worries that are in the way of concentrating on the business at hand	
	Through-out the meeting	When you assign tasks and responsibilities being sure to include in the minutes who is to carry out what and by when (Who-What-When).	
	At the end of the meeting	At the end of the meeting ask people if the meeting achieved the objectives and to write down any ideas for improvement.	

This article is excerpted from the book Meeting Idea Book Please visit <http://www.MeetingDefender.com> web site for the E-book, low cost training and software tools to improve your meetings. ©2012 Joel Levitt