Happy Meeting Plan Template

To ensure a targeted meeting that delivers an outcome you can be ‘happy’ with, use this template to plan and then communicate expectations to your participants. This ensures that everyone can come prepared and the meeting is as productive as possible.

Copy this table into your meeting invitation and edit accordingly.

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| About This Meeting | |
| Topic | One-line characterization of the topic to be discussed – “What's it about?” |
| Goal | Information sharing, decision making, consensus building, etc. |
| Medium | In-person, web/virtual, phone conference, mixed |
| Logistics | Conference Room:  Virtual Meeting Information:   * Meeting link: * Meeting passcode:   Conference Call Information:   * Toll Free: (nnn) nnn-nnnn * Direct: (nnn) nnn-nnnn * Conference code: nnnnnnn (send to all) * *Host code: nnnnnnnn (meeting leader only)* |
| Driver & Purpose  (Key Question to Answer, Decision to Work Toward) | What is the high-level reason or for this meeting? What’s driving you to call this meeting now? I.e., what information do you need to share, what decision are you trying to reach (either now or in the near future), or what key question(s) does this meeting need to answer or resolve to be considered a success? |
| Objective & Expected Outcomes | What gets done and delivered within this meeting? What specifically do hope to achieve by having it? Identify the end products that will come out of it: a decision on XYZ, a brainstormed list of ABC, new knowledge/awareness built... |
| Background or Context | Not everyone may have been involved in the lead-up to this meeting. Set appropriate context for this discussion so that participants are clear why the meeting is being called and can understand what their role is and what contribution is expected from them. |

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| Participant pre-work, if any | What do your invitees need to do or have with them before they come to the meeting? They may need to read something & come to conclusions, they may need to do something and bring the results: *Consider and ask: should this meeting be cancelled/rescheduled if they will NOT have this done?* |
| Attachments, if any | Pre-reading, background info, etc. |
| Agenda | Architect your outcome by actively planning what it will take to get there:   * What detailed topics, tasks or activities will be addressed so that this meeting can achieve the expected outcome you hope for and need   + In what specific order * Consider your facilitation approach for the discussion:   + Identify if exercises or breakouts are needed   + Consider how much time you need to spend on each topic or activity (and if a particular agenda item is really needed) in order to get to the desired outcome.   + Schedule (only) enough time for the meeting to effectively reach the outcome. Make sure you anticipate the level of discussion or ‘tension’ each item may create and bake in enough time for that. * In the setup: Don’t forget to allow for agenda changes and/or meeting pleasantries and relationship building or local customs... |