**University of Missouri Extension**

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# Checklist for Planning a Successful Meeting

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Much time, energy and other resources go into planning and holding meetings. The purpose of a meeting should be to  bring about desired change in a specific group of people or target audience. This change could be in terms of  knowledge, skills, attitudes or aspirations. A meeting can be judged successful to the extent planned objectives are  reached. Success is viewed from both the standpoint of those planning the meeting and the target audience.

Good meetings aren't accidents — they are caused by good planning. Probably 50 percent of meetings are "bores."  Chairs are like T-squares, air is bad, a sleepy atmosphere prevails, and after a long hour talk, there is no time or energy   for questions.

To help in planning meetings, here is a checklist of major elements essential for success.

## Planning for the meeting

- Decide a meeting is the most effective method to provide the desired learning experience.
- Effectively involve a planning committee including representatives of those expected to attend.
- Define in writing the objective that is to be reached. This should include:
    o The audience to be reached
    o The behavioral change expected
    o What is to be taught.

## The audience

The  audience  is  the  individual  or  group  expected  to  attend.  Many  times  meetings  are  called  with  only  a general  or  vague  idea  of  who  is  to  attend.  Sometimes  the  message  is  defined  first  and  sometimes  the audience. In all cases, clearly  define the message, the audience, and their interdependence.

## Defining and presenting the message

Decide how the meeting message should be presented to most effectively bring about desired change in the audience.  This planning has been likened to a vehicle that helps move a group toward its goal.

Some of the techniques that can be used are: lecture, movie, slide-cassette, video-cassette, tape recording, buzz groups,  question-and-answer session, panel, posters, written materials, and demonstration. The techniques used should be   those that will have the greatest impact on the audience to accomplish the meeting objective. Audience participation   tends to increase learning or desired change.

# The meeting place

Select a meeting place that best matches the audience, message and desired techniques. Give consideration to: size, comfort, seating arrangement, acoustics, accessibility of the location, adequate parking facilities. Is the meeting place

"acceptable" to the group? Can it be darkened if desired? Is it well ventilated? Does it encourage the audience to communicate among themselves? If meeting place is larger than needed, stack extra chairs or rope off back rows.

# Meeting responsibilities assigned and accepted

Those expected to help have been involved in planning the meeting. There should be a mutual understanding of the purpose of the meeting; the specific assignments and how they fit into the total program; personal commitment; and dates, time, and place for desired input. Prepare a written summary of assigned duties so all who help know who is responsible for what.

# Audience recruitment and preparation

- Develop a strategy for audience attendance. This should include developing a list of names and addresses of the target audience. The "you all are invited" method seldom works. The methods used to get attendance should be adapted to the specific situation. Variables include: existing level of interest; number of people; geographical location; advance scheduling and notification; methods to be used to recruit and reinforcement needed. Mass media can create awareness, but more personal contacts should follow and reinforce.
- Prepare the audience for the meeting. This includes: letting them know the purpose so it appears important to them; give the time, place and date; provide information on who will attend; let them know of how they can prepare for the meeting and what they need to bring; send an outline of the program; and build their level of interest and readiness.

# The speaker (if any)

Select a well-qualified speaker. Make sure the speaker is scheduled well ahead of time; is briefed as to the audience, the subject, time limits, and over-all program; is informed if a written copy of the speech is desired and a time limit is expected. The speaker should provide a biographical outline for introduction; and arrangements should be made for lodging, expenses and needed equipment.

# The meeting day

- Arrive well ahead of time to make sure all is in readiness. This includes: meeting place unlocked; proper room arrangement; needed equipment available, working and in the right location; room clean, comfortable and properly ventilated; any refreshment or meal plans confirmed. Someone should be available for last-minute requests and emergencies.
- Greet the audience members and make them feel welcome; provide for registration and readable name tags, if desired. Assign most responsibilities to others so you will be available to take care of unexpected needs.
- Someone should meet the speaker(s) and make sure last minute needs are met. Someone should be assigned to greet the speaker(s) and to help with set-up, during the presentation and take-down.

- Provide for a learning experience related to the meeting message for early arrivals. This could be publication display, newspaper clippings, posters, specimens, automated slides, etc.
- Have adequate stand-up breaks and recesses.
- Make sure the program starts, progresses, and ends on time.
- The introduction of the speaker should be brief and should properly prepare the audience for the speaker.
- Make adjustments to ensure that the audience can see and hear, participate and remain alert and comfortable.

# Evaluation of meeting results

An evaluation plan should be developed before the meeting. The evaluation should be done in terms of the meeting objectives. There are seven levels of evidence for evaluation: time and resource input; effectiveness of techniques used;

number and description of people involved; reactions of the audience during the meeting; change in knowledge, skills, attitudes or aspirations; actual practice change following the meeting; and desired end results based on original objectives.

# Follow-up

Follow-up should be planned prior to the meeting. Make certain any commitments made for materials, personal visits or subsequent meetings, or other reinforcement are actually done.

## Related MU Extension publications

- CM109, Developing Effective Communications
  http://extension.missouri.edu/p/CM109
- CM1225, Videoconference — Site Facilitator's Guide
  http://extension.missouri.edu/p/CM1225
- CM1306, How to Have a Successful Educational Meeting on a Public Issue
  http://extension.missouri.edu/p/CM1306
- CM150, Listening: Our Most Used Communications Skill
  http://extension.missouri.edu/p/CM150

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