

Pre-Meeting Checklist



Item	Description	Notes
Get to Know Participants	What are their needs, learning agendas, where are they based? The more you know about your group the better able you are to serve their needs. Do you want to schedule a quick 15-minute pre-call to meet each person? As I have written in the past, this is an essential part of building trust and connection with participants, and gives me a sense of who is going to be "in the room" (even if it's virtual!).	
Create an Agenda	What's the agenda? Virtual facilitators play a key role in holding a strong focus on process. Creating an agenda that meets the needs and purpose of the call/session is critical. Consider what input meeting participants or learners want/need and how you will facilitate this.	
Be Clear on Time Constraints	Be clear about how much time the meeting is really going to take. Sloppy time management can quickly derail a virtual meeting. Add time to your agenda and let group members know how much time there is for each section so they can prepare their input. Remember, accurately estimating time comes from experience, so know you will get better at it!	
Consider Who Should Be Present	Who needs to be at the table? Who is needed to provide information, supply resources, make decisions or provide authority?	
Ensure You Have the Necessary Materials	What will you need during the meeting? Do these need to be sent out to others prior to the meeting? What will they need to have on hand to participate?	
Send out Links and Materials Well in Advance	Aim for the week before if possible, or at least at the start of the week for a meeting later in the week. Keep in mind people's travel schedules and time zones.	
Check Your Technology	Double-check that you have sent out the right bridge line with access codes and/or that your meeting links work and are set for the right time!	
Other		