# Meeting Template Worksheet

For background and instructions on using this worksheet, visit:  
<http://blog.lucidmeetings.com/blog/meeting-design-how-to-create-standard-agendas-for-your-business>

# Meeting Name

*Enter a brief description here.*

|  |  |
| --- | --- |
| **Goal or Purpose** *Why hold this meeting?* |  |
| **Desired Outcome(s)** *What will the group have at the end of the meeting?* |  |
| **Estimated Duration** |  |
| **Who to Invite** *Examples: team members, leadership, people with certain roles…* |  |

## Draft Agenda

This is the agenda *as seen by people invited to participate in the meeting*. Consider adding recommended timing for some agenda items, and brief descriptions where appropriate, as shown in the example below.

Write the draft so it is easy for meeting leaders to copy and paste into meeting invitations.

1. **Introductions (10 minutes)**

Please share your name, your role, and your goal for this meeting.

1. **Review Reports**
2. ***example item 3***
3. ***example item 4***
4. **Closing and Next Steps (10 minutes)**
   * Review action items
   * Set next meeting date

# Instructions for the Meeting Leader

## How to Prepare Before the Meeting

|  |  |
| --- | --- |
| **Schedule and Send Invitations** | *X (days, weeks) in advance* |
| **Equipment needed** | *examples:*   * whiteboard * sticky notes * projector * etc. |
| **Preparation Instructions for Participants** | *Add any required preparation details that should be sent to participants here.* |

### Additional Recommended Preparation

Instructions for what to do before the meeting.

Add instructions here. Examples: prepare reports, reserve a meeting space, brief the project sponsor, etc.…

## How to Lead the Meeting

Provide instructions for each agenda item. Explain why each topic is on the agenda (purpose and expected outcomes) and how long each topic should take. Then describe what the meeting leader should say or do to lead the group through that topic.

Remember that this information does not necessarily need to appear on the agenda shared with participants.

*Copy and edit these example instructions for each agenda item.*

### 1. Introductions

|  |  |
| --- | --- |
| **Purpose of this topic** | Help people transition into the meeting and get to know one another, confirmation of the agenda |
| **Expected Outcomes** | * Everyone knows who is on the call and the plan for the meeting * People are ready to begin the work of the meeting |
| **Estimated Duration** | 5 minutes for greetings and agenda review + 1 minute per person for introductions |

#### Instructions

Welcome everyone to the meeting. State the purpose of the meeting, then start introductions. Ask each person to share:

* + Their name
  + Their role on this project
  + The number one thing they want to accomplish or learn during the meeting.

Introduce yourself first to provide an example.

Once everyone has been introduced, quickly review and update the agenda as needed. Ask:

“Based on what we’ve heard everyone wants to accomplish today, do we need to make any changes to the agenda?”

### 2. Example Topic

|  |  |
| --- | --- |
| **Purpose of this topic** |  |
| **Expected Outcomes** |  |
| **Estimated Duration** |  |

# After the Meeting

Instructions for what to do after the meeting.

Add instructions here.   
Examples: email notes to participants, schedule next meeting, add action items to the task management system, etc.…

# Sample Meeting Record

Provide an example for any meeting where the expected outcome is a document or report. For example, new strategic plans, SWOT analysis, usability reviews, interviews, etc. may all need to result in a report with specialized formatting.

When possible, include the sample report directly in the guide. Otherwise, provide a link to where a sample report can be found.

For all other meetings, provide a link or reference to your organization’s preferred meeting record format.

See the format used by Lucid here:  
<http://blog.lucidmeetings.com/blog/the-anatomy-of-meeting-notes-that-people-will-use>