



Tool: Smart Meeting Planner

Not all meetings require the same level of preparation. Use this planner flexibly: Complete it fully for high-stakes meetings or rely on the Quick Start Guide for a streamlined approach to stay organized and maintaining good meeting habits.

Quick-Start Guide

If you're short on time or don't need the full planner, focus on these key questions:

- What is the purpose of this meeting?

- What are my top 2 – 3 goals?

- **ACTION: Do I need to prepare anything (agenda, materials, questions)?**

- **What's my role in the meeting?**

- **What are the next steps after the meeting?**

If you have more time or need deeper preparation, proceed to the detailed sections below for comprehensive meeting planning.

Meeting Preparation

Meeting Details

- Date and Time: _____
- Host: _____
- Meeting Type (Brainstorm, Status Update, Planning, etc.):

- Meeting Venue (Virtual, Conference Room, Small Office):

Preparation Checklist

- Have I requested or reviewed an agenda?
1. _____
2. _____
3. _____
- What are my goals for the meeting?
1. _____
2. _____
3. _____
- Have I clarified what the host wants to achieve? What are their goals?
1. _____
2. _____
3. _____

- Have I reviewed any materials provided or gathered my own relevant notes?
- Have I prepared any questions or observations to share during the meeting?

1. _____

2. _____

Role and Contribution

My Role in This Meeting:

- Decision-maker
- Contributor
- Observer
- Other: _____

Key Contribution(s):

- What is my primary input or insight for this meeting?

■ _____

■ _____

- Do I have any challenges or questions I'd like to address?

■ _____

Engagement Strategy:

- How will I demonstrate my engagement? (e.g., verbal affirmations, asking questions, note-taking)

■ _____

Post-Meeting Reflection

Complete this section after the meeting to track your impact and identify areas for growth.

Reflection Questions:

- Were my personal goals achieved?
 - Yes
 - Partially
 - No
 - What will I do differently next time?

- Were the host's goals achieved?

- Yes
- Partially
- No
- What steps can I take to better support their objectives in the future?

What Worked Well That I'll Build On:

- _____
- _____

What I Will Do to Improve Next Time:

- _____
- _____

Action Items:

- What are my next steps?

■ _____

■ _____

- Who else needs follow-up?

■ _____

■ _____

Feedback Opportunity:

- Did I check in with a trusted colleague about my contributions or team dynamics?

■ Yes

■ No

■ Notes from feedback:
