**Effective Meeting Worksheet** – Basic Version

|  |  |  |
| --- | --- | --- |
| **Meeting Title** |  | Prepared On: (date) |
| **Meeting Date / Times** | **Date:** 01 Jan 20xx | **Start:** xx:xx AM  | **Finish:** xx:xx AM |
| **Location** |  |
| **Virtual Connection Info** | (Voice #, URL, Passwords, etc.) |
| **Meeting Leader** | **Name:**  | **Tel:**  | **Email:**   |

**Meeting Importance** – This meeting is important because \_\_\_\_\_

*(State the importance to the organization, to the invitee, to customers as appropriate)*

**Meeting Objective and Intended Meeting End Result**

*(State the primary purpose of the meeting and the intended meeting outcome or end result.)*

**Meeting Participants**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Organization | Required / Optional | Virtual OK? | Attended |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |
|  |  | [ ] Req’d [ ] Opt | [ ] Yes [ ] No | [ ] Yes |

**Preparation Required:** *(State what participants need to do prior to the meeting.)*

**Agenda**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Topic** | **Time** | **Topic Lead** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |

**Meeting Record**

**Meeting Results and Notes**

* yy
* yy

**Next Steps**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Next Step | Responsibility | Due Date |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |