



## CHECKLIST

# Four Phases of a Meeting

### **PURPOSE**

This checklist provides the key actions and strategies that need to take place during planning, opening, running, and closing a meeting.

### **When to Use**

Use this checklist when preparing for your UBT meeting.

### **Who Uses**

Co-leads.

### **How to Use**

Use the checklist to prepare for your upcoming UBT meeting. The list provides all the key actions and strategies that can be used during the four phases of a UBT meeting.



## C H E C K L I S T

# Four Phases of a Meeting

### Planning a Meeting

- Agenda
- Logistics
- Contracting
- Co-leading responsibilities
- Room arrangements and setup

### Opening a Meeting

- Reviewing agenda and desired outcomes
- Setting an enthusiastic tone
- Conducting introductions and/or icebreakers
- Establishing ground rules
- Conveying safety and service tips
- Establishing roles and responsibilities
- Reviewing action items and communication plan from last meeting

### Running a Meeting

- Managing the discussion
- Balancing participation: co-leads/team members
- Keeping the process on track
- Using team processes appropriately, including:
  - » Creating visual group memory
  - » Chartpadding
  - » Brainstorming
  - » Sticker ranking
  - » Straw designing

### Closing a Meeting

- Reviewing agreements and action items
- Agreeing on next steps and next meeting's work
- Developing communication plan
- Conducting meeting evaluation