



POWERFULWORK MEETING PREPARATION CHECKLIST

DONE MEETNG PREPARATION TASK

Organizational Level Context and Contracting

- Client Identification
- Event scope established with clear expectations
- Organizational assessment, issues, and group history
- Context within larger organizational initiatives
- High-level design constraints (time, budget, etc.)

Event Level Design

- Event purpose, outcome and deliverables IDentified
- Event relationship outcome IDentified
- Meeting owner IDentified
- Determine decisions to be made through meeting
- Build relationships with key players and clarify expectations
- Select key conversations to accomplish outcomes
- Sequence conversations (informed by Treaded Conversation Model)
- ID resources and data required by each conversation
- Select appropriate tools and activities (informed by conversation mode, group history and org. context)
- Build draft agenda
- Confirm agenda with key players
- ID worst case scenarios for each activity and conversation
- Develop strategies in concert with meeting owner to address worst case scenarios
- Determine appropriate location and physical environment – and visit if possible
- ID required equipment, media and materials for each conversation and activity
- Review, roles and scripting with meeting owner and key players
- Share high-level agenda with attendees
- Ensure required data & information is gathered and prepared (if appropriate, disseminated prior to event)





Event Facilitation

- Use PowerfulWork agenda template to manage the meeting
- Introduce groundrules, futures and parking lists
- Determine recording role and technique
- Stay in close communication with meeting owner – start, on breaks, before closing
- Reconfirm agenda with group
- Be open to conflict and confusion – potential creative breakthrough
- See only positive intention in every behavior
- Stand in the Eye of the Storm- find the stillness -listen for deeper insight (non-anxious)
- When in doubt, ask and trust the group
- Work task until you get stuck – then shift to process
- Bring what is missing from the group
- Model appreciation and encouragement for risk-taking and participation
- Track key threads and overall context
- Summarize progress regularly
- Name behaviors and patterns honestly (those that serve and block performance)
- Do nothing – if the group is moving well on their own (help them build capacity)
- Challenge the group for closure, decisions and next steps
- Ensure accountabilities for next steps are clear and agreed upon
- Encourage meeting evaluation and strength-based appreciation

WANT TO USE THIS TOOL IN YOUR E-ZINE OR WEB SITE? You can, as long as you include this complete blurb with it: PowerfulWork consultants Tom Kornbluh and Marcia Feola are authors of the forthcoming book *Impact!* and offer consulting, training and executive coaching to bring transformational meetings to organizations. If you're ready to put together your breakthrough leadership strategy and lead great meetings, get your FREE tips, templates, protocols and best practice resources now at <http://www.powerfulwork.com/impact>.