

MEETING AGENDA TEMPLATE & EXAMPLE

Agendas are critical to meeting success because they set clear expectations about what needs to be accomplished in your limited time together and who needs to be present to make the meeting meaningful.



Creating a meeting agenda may take some work on your part as the meeting organizer. But if you do your due diligence ahead of time, that work will go a long way in helping you facilitate a productive meeting.

While it's good to be flexible about your agendas, you do have to be clear about a few core details. Here are 4 things every meeting agenda should set out to do:

- Provide the goal(s) of the meeting and any information attendees need to prepare for the meeting
- Ensure the right people are invited or at the table so there won't be any outstanding decisions or conversations after you meet
- Outline discussion topics and who's responsible for leading or presenting each one
- Set boundaries around what will take place during your allotted time

The best way to be clear about these things is to spell them out. So we created a simple meeting agenda template—with an example of how you might use it—to make it easy for you to communicate all the important details before your next meeting. Feel free to adapt the template to your own needs. Just keep in mind that the more information you can provide, the clearer the meeting's purpose and expected outcomes will be.

MEETING AGENDA TEMPLATE

Project meeting name

Meeting date, time

Meeting location

Full list of attendees

Goal: A simple, short statement that describes your goal for the meeting. Be sure to explain what will be discussed, what decisions will be made, and how this will impact your project (if applicable).

Agenda:

Start-to-end time - Topic (Person responsible, if applicable)

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Notes for preparation: Be sure to include instructions or notes about any documents you've attached or expectations you want to set so attendees know what they need to do to come to the meeting prepared.

<Attach documents>

MEETING AGENDA EXAMPLE

Project Kickoff

Thursday, January 10, 10:00-11:00 am

Conference Room C, Second Floor

Attendees: Brett H., Laura L., Kelsey I., Nathan G, Jason K.

Goal: The purpose of this meeting is to discuss our project goals, scope, budget, and deadlines to ensure the whole team is informed about the project before work starts.

Agenda:

10:00-10:05 - Team introductions

10:05-10:25 - Review project goals and intended outcomes (Brett)

10:25-10:40 - Review scope and task budgets (Nathan)

10:40-10:50 - Preliminary planning and deadlines (Brett)

10:50-11:00 - Q&A

Notes for preparation: Attached you will find copies of our project brief, project scope, and estimate. Please review these docs in advance of the meeting, and be prepared to discuss and ask questions. Thanks!