Growth Performance

FOR MEETING FACILITATORS

Team Meeting Facilitation Checklist

Effective facilitation is a skill. This checklist ensures you cover every phase, from preparation to follow-up, so your meetings produce real outcomes, not just activity.

BEFORE THE MEETING, 24 HOURS PRIOR

- [ ] Confirmed meeting purpose and desired outcomes
- [ ] Drafted and sent agenda with sufficient preparation time
- [ ] Sent pre-reads or materials attendees need to review in advance
- [ ] Confirmed the right people are attending (and only the right people)
- [ ] Checked for any sensitivities or dynamics to be aware of
- [ ] Decided how you will capture decisions and actions

BEFORE THE MEETING, 30 MINUTES PRIOR

- [ ] Room/virtual space set up and tested (screen share, camera, audio)
- [ ] Any materials, flip charts, or whiteboards ready
- [ ] Note-taker briefed on what to capture
- [ ] Mentally prepared, you are in the room to facilitate, not to participate
- [ ] Parking lot space created (for items that arise but are off-agenda)

OPENING THE MEETING (FIRST 5 MINUTES)

- [ ] Started on time, not waiting for latecomers beyond 2 minutes
- [ ] Welcomed attendees and acknowledged any first-time participants
- [ ] Stated the purpose and desired outcomes clearly
- [ ] Reviewed the agenda and confirmed timing
- [ ] Agreed ground rules (or reminded the group of existing ones)
- [ ] Named the note-taker and parking lot keeper

DURING THE MEETING

- [ ] Kept the meeting on purpose, redirected tangents to the parking lot
- [ ] Monitored time per agenda item and called adjustments as needed
- [ ] Drew in quieter voices, actively solicited contributions beyond the vocal few
- [ ] Summarised key points before moving to the next item
- [ ] Explicitly named and confirmed decisions as they were made
- [ ] Captured actions in real time with a named owner and due date
- [ ] Managed energy, noticed when the group needed a break or energy reset
- [ ] Used questions more than statements to facilitate thinking

CLOSING THE MEETING

- [ ] Summarised all key decisions made
- [ ] Read out all actions with owners and due dates, confirmed by the owners
- [ ] Addressed parking lot items: assigned, deferred, or dismissed
- [ ] Set the next meeting date and purpose if relevant
- [ ] Closed with a brief check-out: "One word to describe how you're leaving this meeting"
- [ ] Finished on time (or within 5 minutes of close)

AFTER THE MEETING: WITHIN 24 HOURS

- [ ] Sent meeting notes including: decisions made, actions with owners and due dates, next meeting date
- [ ] Addressed any parking lot items that were deferred
- [ ] Followed up directly with anyone who took on a significant action
- [ ] Reflected on facilitation effectiveness: what worked? what would you do differently?

FACILITATION SELF-REFLECTION

WHAT WORKED WELL IN MY FACILITATION TODAY?

WHAT WOULD I DO DIFFERENTLY NEXT TIME?

ONE THING I'LL PRACTISE IN THE NEXT MEETING:

Want help putting this into practice?

Growth Performance builds the human advantage in an AI-driven world, with people, teams and leaders.

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