The Pre Work Checklist

PLANNING – Go find out:

☐ **Clarify the Session Objective** (S.O.)

- Why are we doing this project? Why are we having this meeting? The WIIFM? (What's In It For Me?)

☐ **Decision Making Method**

- If the objective of a project meeting is "Decision Making,"
- How will decisions be made? Consensus?
- What is the team's role in making the decisions?
- What are our working Agreements?

☐ **Participants/ Subject Matter Experts**: The Platinum Rule, WIIFM?

- Who do we want on this team? Why?
- Who needs to be there to accomplish the S.O.?
- How will we contact them? Invite them vs. Tell them?
- The WIIFM?
- What are their Roles and Responsibilities on the project?
- Who else will I talk for: advice, support, perspective?
- Who will I meet with F2F?

☐ **Agenda**: How will each agenda item lead us to the Objective?

- Who can help plan this? Ask for input in the Interviews.

☐ **Agenda Planning**: What is happening in each agenda item?

- Large group discussion, small groups, teams of 2?
- How does each step get us closer to achieve the S.O.?
- Supplies needed?

INTERVIEWS – How you find out what you need to Plan:

☐ **Interview the Project Sponsor/Boss** - if this is you, interview yourself.

- Define the Session Objective. Why are we doing this project?
- Define the roles in the meeting: yours as facilitator, the participants' as subject matter experts, the manager, the boss, etc...
- Define "CONTEXT" and how you recommend setting up the meeting:
  - You'll be posting a Session Objective, Agenda, Agreements, Consensus, Parking Lot
  - U-Shape room set up/ Instructions for on-line set up.
- How will decisions be made? (Recommend Consensus)

Important Questions to Ask:

- "Imagine the session is over … you feel great about what happened. What happened in the meeting/project and what results were achieved that make you feel so good?"
- "What is the session objective" (or overall project objective)
- "What has been going well?"
- "What would you change?"
- "What might be some of the most important topics we discuss at this meeting?"
- "What else would be useful for me to know to make sure the meeting/ project doesn't waste time?"
- "Who would you like to see at the meeting?"

☐ **Interview the Participants once selected.**

- **1st** - Send an introductory **"Facilitator Welcome Letter!"** email explaining you would like to talk with them before the meeting to answer their questions and clarify their role.
- Set up Interviews – (15 minutes is average time needed)
  Face-to-face is best. On- line with cameras on. Phone call, 2nd best.
- Ask them the same questions as above.

EMAILS

☐ **Email 1: Ask all participants for feedback**
(This may or may not apply in all cases)

- When the session objective and agenda are confirmed, send this information to the participants asking for their feedback and questions. Confirm they understand their role in the project/meeting.

☐ **Email 2: "Team Welcome letter" with Participant Logistics. Include:**

- Subject Line in email: ACTION: Thanks in Advance. Please RSVP to this meeting.
- The start and end time of the meeting.
- Location and directions for meeting.
- Ask participants to arrive 10 minutes early to enjoy coffee/tea and snacks.
  Friendly Reminder: you will kick off PROMPTLY at the start time.
- The Session Objective – Why are we here and what we will accomplish?
- Why you were selected (your role)
- The Agenda.
- The Agreements and why (use the Opening session Script)
- Any items to prepare before the meeting – read a document, etc.
- What to bring – data, a pen, sweater, food & H2O…
- Is Lunch provided? If no, a list of restaurants nearby.

LOGISTICS

☐ **Confirm Meeting Logistics**

- Location of the meeting
- Who will set up the room?
- What time can we get in room to set up?
- How will the room be set up? U-shape? Team tables?
- Can we tape posters/charts on walls?
- What Audiovisuals are required?
- Who will bring the AV and set them up? What time?
- Refreshments? Lunch? - How many? Who will set it up? When?
- Who will kick off the meeting? - i.e. project sponsor, boss?
- Who contacts kickoff person to let them know how much time they have for opening remarks? (5 – 7 minutes is ideal)
- Who will record the minutes?
- Who will transcribe the chart pages

ON – LINE:

- Create and send on-line link for ZOOM, MS Teams, etc. 1 week in advance of meeting date.
- Set up your studio: plan for lighting, computer height, background, charts, and supplies.
- Documents for participants sent and received?

☐ **Make charts** (book 1 hour)

- Session Objective
- Agenda
- Agreements
  - Respect the Speaker
  - All ideas Welcome
  - Freedom to Disagree
  - Start and End on Time
  - Electronics off – Cameras ON!
- Consensus
- Parking Lot
- Actions

☐ **Create, Memorize, Rehearse, your Opening Script**

- Script- Create Context
- Open ended questions: What, How, Why?
- Manage your Energy

☐ **Supply List:** see Facilitator's Toolbox Checklist www.superteams.com

- Free Resources tab

☐ **Follow up:** who haven't I heard from that NEEDS to be there?

☐ **New loose ends:**

SET-UP

☐ **Day before/of event**: Block your calendar for set up time.

- Arrive 30- 60 minutes ahead to set up.

☐ **Room Set – up:** U- shape, small group tables?