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:
    o You’ll be posting a Session Objective, Agenda, Agreements, Consensus, Parking Lot
    o 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?