

Strategic Planning Meeting Preparation Checklist

Effective **strategic planning meeting preparation** involves a detailed checklist to ensure all key topics and action items are addressed. This preparation helps streamline discussions, clarify objectives, and assign responsibilities for successful execution. Utilizing a checklist enhances focus and accountability throughout the planning process.

1. **Define meeting objectives and desired outcomes** - *Owner: Meeting Organizer*
 - Outline top priorities and strategic goals
 - Identify specific decisions to be made
2. **Develop and distribute the agenda** - *Owner: Meeting Organizer/Facilitator*
 - Allocate time for each topic
 - Share agenda with participants in advance
3. **Gather and circulate meeting materials** - *Owner: Project Lead/Admin*
 - Send relevant reports, data, and background documents
 - Ensure participants review materials prior to meeting
4. **Confirm attendance & roles** - *Owner: Meeting Organizer*
 - Invite necessary stakeholders
 - Assign note-taker, timekeeper, and facilitator
5. **Check technology and logistics** - *Owner: Admin/IT Support*
 - Book meeting space or set up virtual link
 - Test A/V equipment and screen sharing
6. **Prepare discussion points and questions** - *Owner: All Participants*
 - Reflect on current strategy and challenges
 - List key questions for group input
7. **Set follow-up actions tracking process** - *Owner: Meeting Organizer/PMO*
 - Determine how action items will be documented
 - Assign responsibility and deadlines

Action Items Summary

- Finalize and send out agenda to all participants
- Distribute meeting materials for review
- Confirm attendance and assigned roles
- Test technology/setup logistics for smooth meeting
- Compile questions and strategic input from participants
- Clarify process for tracking and following up on action items