

# HOW TO MAXIMIZE RESULTS FROM EVERY MEETING

Use this checklist to prepare, conduct, and follow up on meetings to ensure efficiency, professionalism, and measurable outcomes.



# How to Maximize Results From Every Meeting

## BEFORE SCHEDULING

- **Confirm necessity:** Make sure a meeting is truly needed (vs. an email or call).
- **Check for conflicts:** Avoid double-booking or overlapping commitments.
- **Clarify goals:** Define the purpose, desired outcomes, and prepare and send an agenda in advance.
- **Choose the format:** Decide whether it's in-person, virtual, or hybrid.



# How to Maximize Results From Every Meeting

## PRE-MEETING PREPARATION

- **Schedule prep time:** Block time to prepare mentally and review materials.
- **Research participants:** Review company and attendee updates (via LinkedIn, Google, press); note recent achievements, shared connections, schools, or interests.
- **Check internal context:** Review CRM for past contacts, matters, or referrals; note any current legal, financial, or operational issues.
- **Plan your questions:** Prepare thoughtful personal and business-relevant questions; be ready to ask follow-up questions as the conversation unfolds.
- **Prepare logistics:** For travel, save contact info on your phone for quick updates; for virtual, test audio/video, optimize lighting and background, silence devices, close other programs; assign a note-taker or confirm recording permissions if appropriate.



# How to Maximize Results From Every Meeting

## MEETING KICK-OFF

- **Arrive early or on time:** Demonstrates discipline and respect.
- **Make a strong first impression:** Eye contact, smile, clear introduction, confident (but warm) demeanor.
- **Open with rapport-building:** Spend a few minutes on personal or social conversation.
- **Transition gracefully to agenda:** Acknowledge discussion before shifting to business.
- **Offer hospitality if hosting:** Simple gestures like taking coat and offering beverages set a positive tone.



# How to Maximize Results From Every Meeting

## DURING THE MEETING

- **Engage fully:** Be present - avoid multitasking; listen actively and demonstrate genuine interest.
- **Take clear notes:** Separate personal/social insights from business items; if recording, ask permission and confirm confidentiality.
- **Stay on track:** Use the agenda as a guide to respect everyone's time.
- **Clarify next steps:** Near the end, recap key points, to-dos, and deadlines.
- **Invite final input:** Pause to ask,
  1. "Is there anything else you'd like to (or we should) cover?"
  2. "Is this topic important enough to have another meeting about it?"



# How to Maximize Results From Every Meeting

## POST-MEETING FOLLOW-THROUGH

- **Update contact records:** Add personal/contextual details and action items to CRM.
- **Act promptly on follow-ups:** Schedule next steps and meet deadlines. Reliability builds trust, ensures things get done, and strengthens relationships.
- **Send a concise recap (if appropriate):** Reinforces professionalism and accountability.
- **Reflect & improve:** Note what worked well and what could be better nexttime.

