

# CHECKLISTS

## STRATEGIC PLANNING SESSION

### FINAL MEETING DETAILS

<b>FACILITATOR:</b>	
<b>EXPECTED TO ATTEND:</b>	
<b>CEO/OWNER/ED:</b>	
<b>MEETING COORDINATOR:</b>	
<b>NOTE-TAKER:</b>	
<b>DATE:</b>	
<b>TIME:</b>	
<b>LOCATION:</b>	

#### COMMUNICATION TIMELINE

- 1 Month Before:** 1) Verbally announce the meeting, 2) Calendar block meeting & invite those who need to attend, 3) Ensure the invitation has been accepted, follow up as needed
- 1 Week Before:** Email agenda
- Day Before:** Reminder email
- Day After:** Follow-up thank you and next steps email
- 1 Week After:** Feedback survey

#### MATERIALS CHECKLIST

- Whiteboard (if the room doesn't already supply one)
- Large Self Stick Flip Chart Paper
- Markers/pens/highlighters
- Notepads
- Healthy snacks and drinks
- Optional: Video recording device
- Optional: Company-branded swag

#### MEETING SPACE CHECKLIST

- Table(s) for attendees
- Table for snacks/drinks
- Chairs
- Whiteboard
- Privacy – meet in a room with a door, away from others, to protect sensitive conversations
- Projector or TV for visual presentation
- Wi-Fi Connectivity

#### PREPARE & PRINT THE DOCUMENTS

- Agenda
- Meeting Notes
- Digital Visual Presentation