

Board meeting preparation checklist

1. Pre-meeting planning

- Outline meeting objectives and create a focused agenda.
- Identify key attendees and consider inviting subject matter experts for specific topics.
- Book a suitable meeting room with comfortable seating and appropriate technology based on the agenda.
- Plan the meeting layout and any technical equipment needed (projector, microphones).
- Compile a list of all necessary documents, reports, and equipment for the meeting.

2. Pre-meeting check and backup

- Conduct a final check to ensure all equipment is functioning properly.
- Confirm availability of all materials and room readiness.
- Prepare backup plans for potential issues (e.g., power outages, internet issues).
- Consider alternative presentation methods.
- Send a final meeting confirmation email with the agenda, access details, and a gentle reminder to review pre-distributed materials.

3. Material acquisition and room preparation

- Order or collect necessary materials for meeting participants.
- Consider hiring temporary technical support to manage equipment setup and troubleshooting during the meeting.
- Set up equipment and test functionality.
- Incorporate elements like natural light, plants, and white noise machines to create a focused and comfortable meeting environment.
- Ensure the meeting space and materials are accessible for attendees with disabilities.

4. Meeting day

- Greet attendees warmly, offer refreshments, and facilitate introductions if needed.
- Set out refreshments and distribute materials to attendees.
- Use multimedia tools and storytelling techniques to make presentations more interesting.
- Assign a dedicated notetaker to capture key decisions and action items in real time.
- Monitor time and adjust the agenda as needed to ensure all topics are covered.

5. Post-meeting review and improvement

- Send a quick post-meeting survey to attendees to get feedback on the meeting's effectiveness and suggestions for improvement.
- Create a system for tracking allocated tasks, including deadlines and responsible parties.
- Complete a debrief report summarizing critical choices, action items, and lessons learned. Share it with the relevant stakeholders.
- Set up a centralized repository (e.g. board portal) to save all meeting materials, recordings, and minutes for future reference.
- Update the checklist if needed.

Simplify your board meetings and streamline collaboration using board portal solution.

According to the [board portal comparison](#), experts recommend the [iDeals' board portal](#) as the number one board management software:



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