

# Whole Brain<sup>®</sup> Meeting Checklist

**A**

- ☐ Give clear descriptions of goals/outcomes.
- ☐ Be efficient in your process.
- ☐ Focus on the bottom line and be succinct.
- ☐ Provide appropriate data and financials.
- ☐ Plan for analysis, debate, and critical discussion.
- ☐ Evaluate the meeting process for improvement.

- ☐ Share a detailed agenda well ahead of time.
- ☐ Assign meeting roles (facilitator, timekeeper, notetaker).
- ☐ Be consistent - respect meeting protocol and norms.
- ☐ Stay on track and avoid side conversations.
- ☐ Track each action item with who is responsible, how it will be accomplished, and when it's due.
- ☐ Close the meeting with a quick recap of what was covered and outline the next steps.

**B****D**

- ☐ State the vision and discuss the future.
- ☐ Provide objectives to stimulate thinking.
- ☐ Allow time to “get out of the box.”
- ☐ Provide variety and opportunities for fun.
- ☐ Allow time for brainstorming, conceptual discussions, and free flow of ideas.
- ☐ Discuss the “big picture” or global context.

- ☐ To “connect,” start with a check-in process.
- ☐ Encourage all to voice their ideas.
- ☐ Include diverse attendees.
- ☐ Allow time to share and build trust.
- ☐ Make sure attendees are comfortable and have access to what they need.
- ☐ Encourage active participation - keep cameras on if meeting virtually.

**C**