

# Marketing 101

# Meeting basics

If you've ever been in charge of planning a meeting or other event, you know that there's many things to think about and a lot of work to do. Here's a few Meeting Checklists to help you stay organized. Some tasks won't apply to every situation, and there will be other times when you'll have many tasks to add. At the least, these lists can get you headed in the right direction.

## Before the Meeting

- Clarify your purpose for the meeting
- Draft agenda for meeting
- Identify potential group members
- Identify a facilitator (if needed)
- Select date, time, and site for meeting
- Notify group members of meeting
- Identify and invite resource people
- Prepare materials for the meeting
- Arrange for visual aids
- Arrange for food and beverages
- Arrange for signs (if needed)
- Confirm site arrangements
- Follow up with facilitator & resource people on arrangements, materials and introductions
- Prepare agenda and evaluation form
- Check on equipment and supplies
- Write (or collect from speakers) introduction(s)
- Arrange for parking
- Supervise delivery food, refreshments

## On the meeting day

- Inspect room for correct set-up, temperature and lighting
- Hang/set out signs
- Double-check audio visual equipment
- Handle any problems with food, refreshments, room, audio visual equipment
- Hand out evaluations

## After the Meeting

- Supervise return of visual aid equipment, supplies and resource materials
- Arrange for payment of bills, if any
- Collect and analyze evaluation forms
- Send thank you letters to resource people, speakers, and others who helped

## Supplies and Equipment

- Notepad
- Handouts and other visual aids/props
- LCD Projector
- Laptop computer
- CD, disk with powerpoint presentation
- Flipchart easel and paper pad
- Magic Markers
- Masking Tape
- Overhead projector
- Extra bulbs for projectors
- Screen
- Slide projector
- Extension cords & adapter
- Tape recorder
- Video
- Name Tags
- Pencils/Pens

## Selecting a site

When searching for potential meeting sites consider the following criteria.

- \_\_\_ Proximity: How close is this site to the largest number of group members?
- \_\_\_ Cost: Is there a charge for using the site?
- \_\_\_ Flexibility: Are there extra rooms nearby if we need them for break outs?
- \_\_\_ Accessibility: Is the site easily accessible to people with disabilities?
- \_\_\_ Food and refreshments: Can food and refreshments be provided on site, in the room, or nearby? Are their vegetarian or special dietary need choices?
- \_\_\_ Parking: Is parking convenient? Is parking free, or does it require payment or a permit?
- \_\_\_ Visual aid equipment: Does the site have equipment on hand? Is it free or is there a fee?
- \_\_\_ Experience: If you used this site before, was the experience positive or negative? If negative, can those earlier problems be overcome?

## Evaluating a potential meeting room

As you check out different meeting spaces, consider these questions.

- \_\_\_ Atmosphere: Is the room cheerful and inviting? Does it have outside windows?
- \_\_\_ Layout: Is the room large enough for your needs?
- \_\_\_ Furniture: Are the chairs comfortable for longer meetings? Is the furniture moveable?
- \_\_\_ Conveniences: How far away are the rest rooms, fire exits, vending machines, elevator, stairs?
- \_\_\_ Lighting: Is there sufficient lighting? Can the room be darkened easily for audio visual presentations?
- \_\_\_ Noise: Is the room free of excessive noise and interruptions?
- \_\_\_ Outlets: Are outlets available for your equipment? If not, are there extension cords available?

\_\_\_ Heating and Cooling: Will the temperature be appropriate and can you control it yourself?

\_\_\_ Telephone: Is there a phone nearby for participants to use privately? are there pay phones nearby? is there a phone in the meeting room (and do you want one there)?

## Recording using a flipchart

- Position the flipchart so everyone can see it. Walk to different parts of the room to check for readability.
- Stand at an angle to the easel as you write and then stand to the side while listening to the next speaker.
- Write in large block letters at least 1 1/2 inches high.
- Leave about two inches or more between lines.
- Use several colored magic markers.
- Support the facilitator. Work cooperatively.
- Listen to the comment. Then write.
- Be brief, but try not to evaluate or edit the comments.
- Abbreviate words and use symbols but make sure the group understands them.
- Highlight key words with contrasting color
- If you aren't sure how to spell a word ask for help.
- As a sheet is full, tear it off and tape it on a wall. Ask someone else to help you with this task.

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*Sources: SCS Informational Booklet, Pre-Meeting Arrangements and Visual Design*