The Perfect Power Meeting Checklist

As you begin planning for your meetings at NEMRA20, please consider using the following tool to help you run a high-impact meeting.

✔ PREPARATION

☐ PLAN- Determine your objective for each meeting you have
☐ SUCCESS- Outline what a successful meeting looks like
☐ AGENDA- Prepare written agenda and discuss/send to manufacturers in advance
☐ 3 CLEAR POINTS- Stay focused on 3 main points and be ready to speak to each
☐ BRAND- Presentation materials should express YOUR brand and look professional
☐ CONFIRM- Confirm purpose, time, and location via email the day before

✔ EXECUTION

☐ OPEN- Open meeting crisply by stating the purpose, benefit, check
☐ NOTES- Assign a colleague to take notes on key points and actions needed
☐ IMPACT- Ask impact questions where they can contribute to your conversation
☐ PIVOT- Pivot smoothly between main subjects when meeting content drifts off course
☐ BOLDNESS- State your message clearly...take charge and run the meeting
☐ PRESENCE- Use body language, humor, repetition to project confidence
☐ CLOSE- Close the meeting strongly using 5 elements; summarize, action items with responsibilities, check to determine if meeting was successful, schedule next meeting or conference call (if appropriate), and say thank you

✔ FOLLOW UP

☐ EMAIL- Immediately following the conference, send an email summarizing the action items recorded by the designated note taker

** Adapted with permission from material developed by Craig Wortmann at Northwestern/Kellogg