

Session Title _____ **Date:** _____

Before the Meeting:

- Set learner outcomes
- Confirm session details with speaker, including information needed for introduction and handouts
- Promote meeting in various ways in accordance with your marketing plan
- Download, print, and bring copies of the meeting forms:
 - Agenda
 - Evaluation Form
 - Attendance Form
 - New Attendee Information Form
- Arrange for light refreshments
- Gather props as needed
- Bring name tags
- Order, set up, and test A/V equipment
- Arrange room, set up, parking and other logistics as needed
- Other items _____
- Note any group business to discuss: _____

After the Meeting:

- Write a thank you note to the speaker. Consider reaching out to each attendee and thanking them for their participation.
- Review evaluation feedback forms and share with speaker. Make adjustments to format of the next meeting if needed.
- Add attendee information in ROI.
- Conduct any further attendee engagement activities as planned.