

Preparing for a Meeting or Appointment

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Most of us attend meetings or appointments starting with our very first job. These meetings may be team meetings. Some may be individual appointments. They may include meetings with supervisors, peers, customers and clients. What most of us may not be as familiar with, is how to prepare for a meeting or an appointment.

The following points are provided to assist an individual in preparing for any type of meeting or appointment.

1. First, to show your respect for others, always be on time. To account for unforeseen circumstances, try to be five to fifteen minutes early for each meeting and appointment. If you are going to be late, call ahead.
2. Always have a pad of paper with you for any meeting or appointment you attend. This should be done for at least three reasons:
 - 2.1. You may use it to write down points you wish to remember. This may consist of putting the name of the meeting at the top of the page. Below it writes the word "Notes" and add the date in the right margin. Then write down each point you wish to remember or refer back to after the meeting concludes.
 - 2.2. If during the meeting you are asked to do something or you think of something you want to do after the meeting, then write the name of the meeting at the top of another page. Write the words "To Do" below it and the date on the right-hand margin. Below this write down any actions you wish to follow up on after the meeting and when these activities should be completed.
 - 2.3. When you return to your workplace after the meeting, place both pieces of paper mentioned above in your in-basket. When time allows during the remainder of the day, determine the time and date you will work on each "To Do" item and enter that action in your Outlook. If necessary, create folders for each separate "To Do" item and place any relevant materials in each folder. Label the folder with the name you chose when you entered the activity in your Outlook. Place your "Notes" sheet(s) in a relevant folder and store it in a location that is easy to remember for future reference, such as your filing cabinet. State in Outlook where the folder is stored.
3. Consider having a separate three-ring binder for ongoing individual or group meetings. Add dividers and/or folders to the binder to separate the various items that are normally discussed at ongoing meetings. Consider taking this binder with you to each meeting.
 - 3.1. Mark one folder "General" and put material in it that includes handouts that were shared with you that you may need to read prior to and/or discuss at a future meeting. Put other material in it that you may want to share with others at an upcoming meeting.
4. If you receive the agenda in advance of an upcoming meeting, take a minute in advance to review the items and schedule time to complete any related tasks. Then place any relevant materials for that meeting in your meeting binder.
5. Always attend each meeting inside or outside the organization with the following items:
 - a) Meeting binder and relevant folders (if appropriate)
 - b) Relevant materials in folders
 - c) Pad of paper to write "To Do" items and "Notes" items
 - d) Pencil