

Worksheet 2 — Meeting Setup and Prep

Getting the meeting

Contact	Title	Email / phone	Date reached	Response

Proposed meeting dates offered:

Team roles for the meeting

Role	Name
Lead / opens and closes	
Note taker	
Timekeeper / question tracker	

Questions sent ahead (aim for five)

Remember the question that opens doors: "What do you need to do the job effectively?"

After the meeting (same day if you can)

What we learned that we did not know before:

What surprised us:

Follow-ups promised, by whom, and by when:

Housekeeping	Done?
Thank-you email sent to the department	
Notes shared with full team	
Follow-up meeting needed?	