

Data Sheet

The GoTo Meeting Organizer and Presenter Checklist

Calling all meeting leaders, moderators, and hosts!

Follow this guide to ensure a seamless collaborative experience before, during, and after your meetings.



Before the Meeting

- Establish an objective—and stick to it.** What key decisions need to be made? What actions need to be taken? If you can't define the objective, you aren't ready to have a meeting.
- Choose your people carefully.** Be mindful when inviting people to your meeting—you're probably not the only person asking for their time. No one wants (or needs) a calendar of back-to-back meetings.
- Set the agenda.** For smaller meetings, a few bullets will suffice. Larger meetings may require a more structured approach. Either way, craft an agenda and send it out beforehand so your attendees are prepared.
- Get clarity on goals.** Reach out to each attendee and ask them what they hope to accomplish in the meeting. This will give you insight into who cares about what, which can help you manage any conflicts that may arise.
- Assign roles and share expectations.** Maximize everyone's time by assigning meeting roles and communicating expectations up front. Ensure that presenters are equipped with the tools and materials they need.
- Establish meeting protocols.** When should people ask questions? Will you tolerate latecomers? Having to recap for the benefit of late arrivals can be disruptive and a waste of time.





During the Meeting

- Put your best face forward.** Video allows you to establish rapport with your peers and encourages personal connections. As the organizer, your participation on video will set a great example—so make it a point to activate your webcam unless you absolutely need to avoid it.
- Facilitate the discussion.** Confidently guide the conversation, maintain the tempo, and ensure no single voice drowns out everyone else. Make certain your voice is dominant, your visuals are captivating, and your speech is interesting enough to keep people following you.
- Appoint a timekeeper.** This will help the meeting run on schedule, so you can focus on the subject matter. The timekeeper should keep an eye on each agenda item and inform everyone when it's time to move on.
- Take notes.** You'll want to have a record of questions, tasks, and follow-up items that have been directed at you and other attendees. If you're not the world's greatest multi-tasker, our Smart Meeting Assistant provides word-for-word speech transcription without lifting a finger.



After the Meeting

- Follow up appropriately.** Timing is everything here! Oftentimes, attendees are reluctant to move forward on action items until they see them in writing. For those who didn't attend, follow-up becomes even more important as a guide that tells them not only what they missed, but what's coming next.