

# THE EXERCISE

DATE \_\_\_\_\_ TIME \_\_\_\_\_

MEETING LEADER \_\_\_\_\_

OBJECTIVES & DELIVERABLES  
WHY ARE WE MEETING?

RESOURCES TO REVIEW PRIOR TO THE MEETING  
HOW CAN I SHOW UP PREPARED?

## STAFF ATTENDING

NAME	ROLE/EXPECTATIONS (WHY AM I HERE?)
①	
②	
③	
④	
⑤	
⑥	

## CLIENT REPRESENTATIVES ATTENDING

NAME	ROLE / EXPECTATIONS (WHY AM I HERE?)
①	
②	
③	
④	
⑤	
⑥	

## MEETING AGENDA

TIME	DISCUSSION LEADER	ACTION / TOPIC

# THE EXERCISE

The Meeting Agenda Sheet – Feel like you meet for no reason, or with no resolution? Put an end to bad, long or pointless meetings with a little bit of planning. This agenda worksheet should help.

DATE <i>06/02/2015</i>	TIME <i>1 pm</i>
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MEETING LEADER  
*Steve Smith*

OBJECTIVES & DELIVERABLES  
WHY ARE WE MEETING?  
*To begin putting the new strategic marketing plan in place for January 2016 unveiling*

RESOURCES TO REVIEW PRIOR TO THE MEETING  
HOW CAN I SHOW UP PREPARED?  

- *Marketing Plan Overview*
- *Schedule of important dates*

## STAFF ATTENDING

NAME	ROLE/EXPECTATIONS (WHY AM I HERE?)
① <i>Connie Jacinto</i>	<i>- overall strategy and input</i>
② <i>Travis Anglevine</i>	<i>- overall strategy and input</i>
③ <i>Donnovan Locke</i>	<i>- examine media buys required</i>
④ <i>Andy Bradley</i>	<i>- event planning for launch event</i>
⑤	
⑥	

## CLIENT REPRESENTATIVES ATTENDING

NAME	ROLE / EXPECTATIONS (WHY AM I HERE?)
① <i>Cynthia Carson</i>	<i>- Epic Marketing firm - walk through strategy plan</i>
② <i>Bobby Brown</i>	<i>- Epic Marketing firm - walk through website/social timelines</i>
③	
④	
⑤	
⑥	

## MEETING AGENDA

TIME	DISCUSSION LEADER	ACTION / TOPIC
<i>1 - 1:10</i>	<i>Connie</i>	<i>Lay out overall agenda and plan for this meeting</i>
<i>1:10 - 1:20</i>	<i>Cynthia</i>	<i>Discuss marketing purpose behind strategy plan</i>
<i>1:20 - 1:40</i>	<i>Andy</i>	<i>Discuss plans for event launch and timeline</i>
<i>1:40 - 1:50</i>	<i>Bobby/Donnovan/Andy</i>	<i>Determine marketing timeline around event</i>
<i>1:50 - 1:55</i>	<i>All</i>	<i>Finalize action list and next steps</i>
<i>1:55 - 2</i>	<i>All</i>	<i>Coordinate follow up meeting time for next week</i>
<i>2</i>	<i>ADJOURN</i>	