

## Sample

### Meeting Purpose/Objective

- \_\_\_ Make a decision on: \_\_\_\_\_  
 \_\_\_ Coordinate activities for: \_\_\_\_\_  
 \_\_\_ Get Feedback from others on: \_\_\_\_\_  
 x \_\_\_ Generate ideas for: *Brainstorm user stories for the next release of product x and for the feature/enhancement*  
 \_\_\_ Strategize: \_\_\_\_\_  
 \_\_\_ Discuss options and alternatives for: \_\_\_\_\_  
 \_\_\_ Prioritize: \_\_\_\_\_

### Who needs to be in the meeting to accomplish the objective?

#### Name & Role

- \_\_\_ John Smith, Operations Manager \_\_\_\_\_  
 \_\_\_ Wanda Phul, Product Manager \_\_\_\_\_  
 \_\_\_ Ty Tannick, Stakeholder \_\_\_\_\_  
 \_\_\_ Sam Pull, Project Manager \_\_\_\_\_

#### Prep Conversation

- \_\_\_ discuss risks to his operation \_\_\_\_\_  
 \_\_\_ go over related projects \_\_\_\_\_  
 \_\_\_ review top enhancements \_\_\_\_\_  
 \_\_\_ evaluate resources for next release \_\_\_\_\_

### What activities will the meeting need to fulfill the objective?

#### Activity & Goal

- \_\_\_ Introduce meeting participants \_\_\_\_\_

#### Instructions

- \_\_\_ ask participants to write name and role on team \_\_\_\_\_

#### Tool

- \_\_\_ WebEx Whiteboard \_\_\_\_\_

#### Risk & Risk Mitigation

- \_\_\_ new to WebEx, send out instructions beforehand \_\_\_\_\_

#### Activity & Goal

- \_\_\_ Brainstorm user stories for upcoming features \_\_\_\_\_

#### Instructions

- \_\_\_ generate ideas before placing in chronological order \_\_\_\_\_

#### Tool

- \_\_\_ CardBoard \_\_\_\_\_

#### Risk & Risk Mitigation

- \_\_\_ new to Cardboard, add everyone as a collaborator \_\_\_\_\_

#### Activity & Goal

- \_\_\_ In breakout rooms read and react to user stories \_\_\_\_\_

#### Instructions

- \_\_\_ Collectively summarize thoughts on user stories \_\_\_\_\_

#### Tool

- \_\_\_ Zoom \_\_\_\_\_

#### Risk & Risk Mitigation

- \_\_\_ some USB audio devices echo, test prior to joining \_\_\_\_\_

### Meeting Model/Who is where?

**Satellite:** one or few remote users



**Cluster:** team is in groups in a few locations



**Nubula:** whole team is dispersed



## Template

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### Who needs to be in the meeting to accomplish the objective?

#### Name & Role

#### Prep Conversation

\_\_\_\_\_  
 \_\_\_\_\_  
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 \_\_\_\_\_

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### What activities will the meeting need to fulfill the objective?

#### Activity & Goal

#### Tool

\_\_\_\_\_

\_\_\_\_\_

#### Instructions

#### Risk & Risk Mitigation

\_\_\_\_\_

\_\_\_\_\_

#### Activity & Goal

#### Tool

\_\_\_\_\_

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#### Instructions

#### Risk & Risk Mitigation

\_\_\_\_\_

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#### Activity & Goal

#### Tool

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\_\_\_\_\_

#### Instructions

#### Risk & Risk Mitigation

\_\_\_\_\_

\_\_\_\_\_

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