

# Phone Call/Meeting Planner

Some phone calls/meetings can feel intimidating. This form helps you to identify what the key points are to help you to stay on task and finish the call or be prepared for a meeting without undue procrastination. In order to be best prepared, please think through the following 2 sections and complete BEFORE picking up the phone or attending the meeting. (HINT: write in bullet points. Only write enough to cue your brain quickly so you can think and speak succinctly.)

What do you need to have in order to be prepared for the call/meeting (such as the phone number, name of the individual(s), ID #'s, paperwork or other forms, notes?) Gather these materials.

---

---

What is the reason for this call/meeting (Address billing issue? Give information? RSVP to an event? Give a status update on your work? Set plans for the term?)? What is your goal/intention/hope/agenda for this call/meeting?

---

---

What do you need to convey? What information is most important for you to share/provide?

---

---

---

Do you need to get anything in particular from this phone call/meeting (such as confirmation of an action, a registration number, referral, specific instructions, phone number, etc.)

---

---

**TO COMPLETE DURING OR JUST AFTER THE CALL/MEETING:** Were you given any assignments, tasks, or homework to complete? Are there specific deadlines? Write them down NOW.

---

---

---