

Complete Meeting Checklist

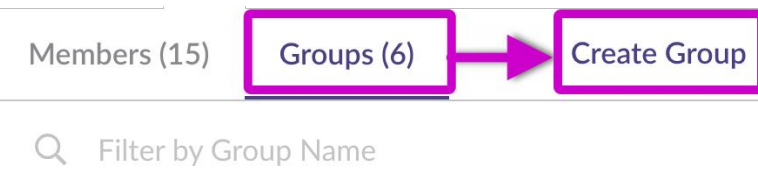
This checklist provides step-by-step guidance for new Meeting Admins to set up, manage, and publish an OnBoard meeting from start to finish.

Find more trainer-readiness resources in the [Train-the-Trainer Toolkit](#).

For additional questions or technical support, email help@onboardmeetings.com.

i Before You Start

- Confirm the correct [Group](#) exists for your board or committee
- Create or update Groups as needed and add members



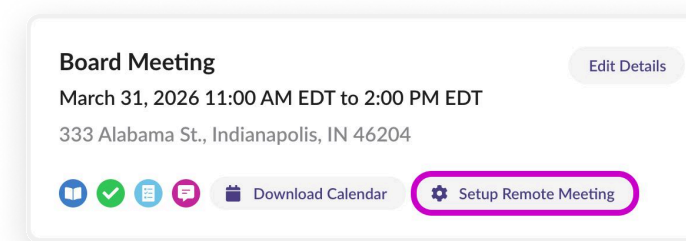
1 Create the Meeting

- Go to [Meetings](#) and create a new meeting
- Enter Meeting Name, Date/Time, and Location



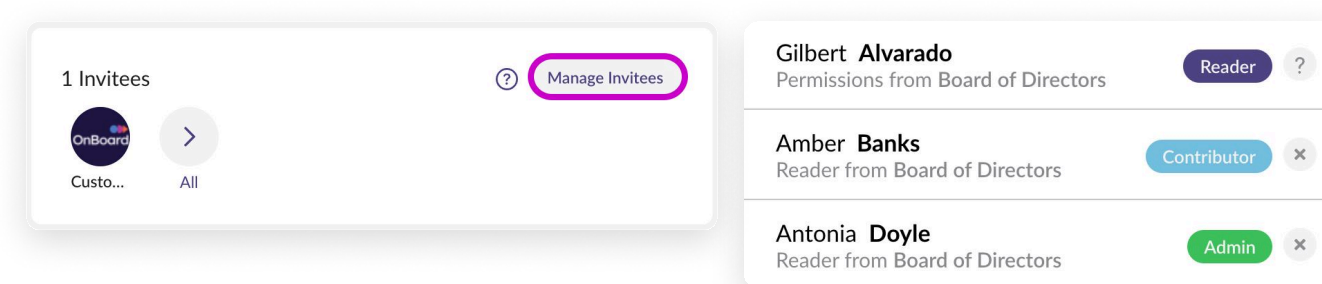
2 Remote or Hybrid Meetings

- Configure [Remote Meeting](#) details



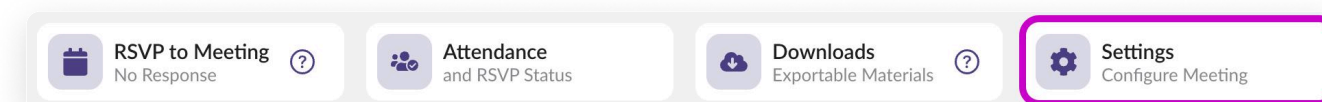
3 Invitees & Permissions

- [Add Invitees](#) by Group
- Manage Permissions (Admin, Contributor, Reader)



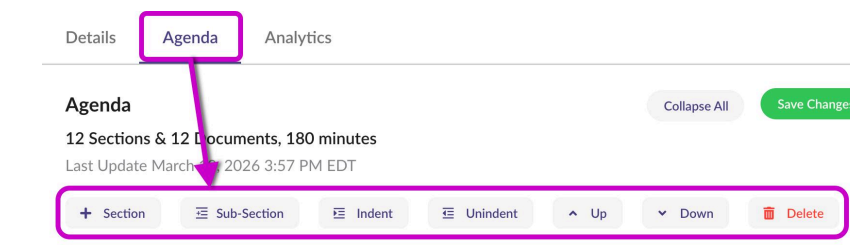
4 Meeting Settings

- Select [Settings](#) to manage individual meeting settings (Table of Contents, Downloads)



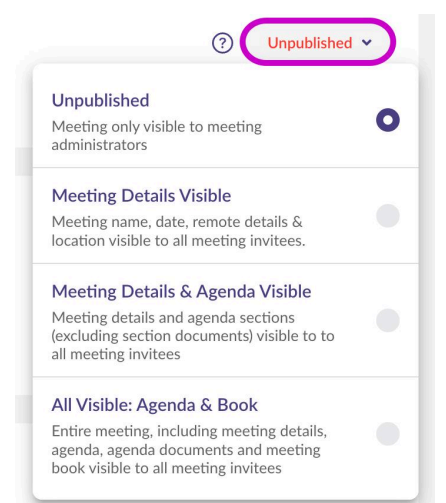
5 Agenda & Materials

- [Create Agenda](#) sections and sub-sections
- [Edit Section Details](#) (titles, durations, presenters)
- Upload and organize documents by section



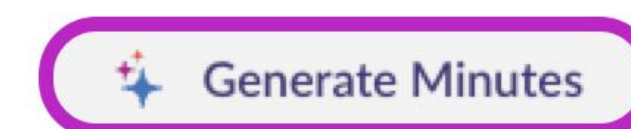
6 Publish & Notify

- Set the appropriate [Meeting Visibility](#) and send notifications



i Minutes: During or After the Meeting

- Capture minutes using [Minutes AI](#) or [Minutes Builder](#) (if available)



i Time-Saving Tip

- [Duplicate](#) a previous meeting or use a [Meeting Template](#)

