



▲ ATlassian  
Community

COMPANY USER GROUP

# Meeting Plan Template

This page acts as a structured guide for organizing Company User Group meetings, presenting comprehensive steps and timelines. Make use of this planning template, either by editing this PDF or making a copy of our [Confluence page](#) to guarantee an organized method for planning your next meeting.

## Create your meeting plan

Use the below template or leverage the ready-to-copy [Confluence page](#) to easily organize and plan your next meeting.

<b>Status</b>	<i>IN PROGRESS, DONE</i>
<b>Driver</b>	<i>That's you</i>
<b>Contributors</b>	<i>Other CUG Leaders</i>
<b>Purpose</b>	<i>Why are we doing this now?</i>
<b>Target launch date</b>	<i>(Date goes here)</i>
<b>Goals</b>	<i>Meeting goals (i.e., new licenses added, new Atlassian product updates, internal training etc.)</i>
<b>Format</b>	<i>Product Breakout Session, Lunch &amp; Learn, AMA, etc.</i>
<b>Sample copy for speaker asks (if needed)</b>	<p><i>The Atlassian Company User Group is organizing a discussion about X in [month/timeframe] and is seeking presenters to share their insights on the topic.</i></p> <p><i>The session will consist of an X-minute conversation, followed by Q&amp;A sessions and updates from Atlassian. This will be an informal gathering where all participants are encouraged to ask questions in real-time or submit them via chat. The session will also be recorded and made available on-demand following the event.</i></p> <p><i>If there are any other topics you'd be interested in, please share in the thread below.</i></p>

# Meeting plan tracker template

*Add in dates for your events, starting 4 weeks out from the meeting date*

<b>Time</b>	<b>Agenda Item</b>
<i>Jul 3, 2024</i>	<i>4 weeks out</i>
<i>Jul 10, 2024</i>	<i>3 weeks out</i>
<i>Jul 17, 2024</i>	<i>2 weeks out</i>
<i>Jul 24, 2024</i>	<i>1 week out</i>
<i>Jul 31, 2024</i>	<i>Meeting</i>

## Change to Meeting plan tracker template

*This meeting plan template is designed to ensure a structured approach to planning and executing engaging Company User Group meetings.*

<b>Category</b>	<b>Work-stream</b>	<b>Owner</b>	<b>Due date</b>	<b>Notes/links</b>
<b>Meeting logistics</b>	Decide on the meeting format	CUG Leader	4 weeks out	<ul style="list-style-type: none"><li>• Product Breakout session</li><li>• Use Case</li><li>• Lunch and Learn (Brown Bag)</li><li>• AMA</li></ul>

Category	Work-stream	Owner	Due date	Notes/links
<b>Meeting logistics cont.</b>	Schedule meeting	CUG Leader	4 weeks out	<ul style="list-style-type: none"> <li>• Select date and time for your meeting</li> <li>• Book a meeting space</li> <li>• Decide on the meeting format” after second bullet</li> </ul>
	Role assignment	CUG Leader	4 weeks out	<ul style="list-style-type: none"> <li>• Confirm Meeting Lead(s)</li> <li>• Confirm MC(s)</li> <li>• Confirm Moderator(s)</li> <li>• Confirm Tech Support</li> <li>• Confirm Promoter(s)</li> </ul>
	Create preso deck	Meeting Lead(s)	4 weeks out	<ul style="list-style-type: none"> <li>• Use Atlassian CUG 24’ <a href="#">Link here</a> to create presentation</li> </ul>
	Speaker selection	Meeting Lead(s)	3-4 weeks out	<ul style="list-style-type: none"> <li>• Confirm speaker(s)</li> <li>• For Atlassian SMEs, connect with your account team early to secure their participation.</li> <li>• Share your presentation deck so speaker(s) can update their slides</li> <li>• Get speaker’s headshots/bios</li> <li>• Send initial presentation or questions for review/feedback</li> <li>• Send a courtesy message to speakers 3-0 days out, reminding them of your upcoming event and their commitments</li> </ul>

Category	Work-stream	Owner	Due date	Notes/links
<b>Meeting logistics cont.</b>	Decide on the meeting format	Meeting Lead(s)	2 weeks out	<ul style="list-style-type: none"> <li>• Template slides are removed</li> <li>• Speaker slides are completed</li> <li>• Atlassian update slides are selected</li> <li>• Survey QR code has been updated</li> </ul>
	Dry-run preso	Meeting Lead(s)	1 weeks out	<ul style="list-style-type: none"> <li>• Everyone is comfortable with MC running the slides</li> <li>• Webcams and audio are clear</li> <li>• Virtual back</li> <li>• Talk tracks/presentations are clear</li> <li>• Presentation deck is completed</li> </ul>
<b>Promo</b>	Post meeting announce	Promoter	2 weeks out	<ul style="list-style-type: none"> <li>• Meeting announcement posted to CUG channel or sent via email</li> </ul>
<b>Meeting</b>	Actual meeting	MC	Day of	<ul style="list-style-type: none"> <li>• Confirm WiFi name/password</li> <li>• Test A/V equipment</li> <li>• Start on time</li> <li>• Repeat the goal of the meeting</li> <li>• Provide updates on tasks from previous meeting(s) if applicable</li> <li>• Follow to the agenda, stay on time</li> <li>• Stay focused, place new topics on parking lot for next meeting</li> <li>• Take clear brief notes and distinguish between informational notes and decisions</li> <li>• Before meetings ends, ask attendees to fill out your survey</li> </ul>

Category	Work-stream	Owner	Due date	Notes/links
<b>Post meeting</b>	After meeting	Promoter	1 week post meeting	<ul style="list-style-type: none"> <li>• Meeting announcement posted to CUG channel or sent via email</li> <li>• Take time to debrief with your team; talk about what went right, and what can be improved</li> <li>• Share your learnings by writing a post-event summary in the Atlassian Community</li> </ul>

This structured guide for organizing CUG meetings offers a comprehensive planning template that ensures an organized method for planning meetings. By following the detailed steps and timelines provided in the template, users can effectively plan and execute engaging Company User Group meetings with ease.

