

Downloadable checklist

Planning your next meeting room technology refresh

A guide to scoping a refresh around outcomes, not just what's ageing out

2026

Technology is what makes modern workplaces actually work. This checklist puts a refresh in order, phase by phase, built around what the rooms need to do rather than just replacing what's there with something newer.

01

Phase 1

Understand how your rooms/spaces are actually used

Before replacing anything, get clear on what's actually happening in these rooms today. That's what should drive the refresh, not just what's ageing out.

- ☐ Which rooms get used the most, and for what kind of work? (video calls, in-person meetings, quiet focus)
- ☐ Which rooms sit mostly empty, and why? Wrong size, hard to book, or technology that puts people off?
- ☐ What's actually breaking or causing complaints? (dropped connections, audio issues, the wrong cable, an app nobody can find)
- ☐ How do people currently start a meeting in these rooms? Is it simple, or does it need someone "who knows how"?
- ☐ What platform does the business actually run meetings on, and does the current technology properly support it?
- ☐ How do visitors or external guests join calls in these rooms? Is that experience consistent room to room?
- ☐ What's changed since these rooms were last fitted out? (team size, hybrid patterns, the kind of meetings people actually have now)

02

Phase 2

Defining what good looks like

A refresh works best when it's scoped around outcomes, not a like-for-like swap of what's already there.

- ☐ What would "this room just works" actually mean for the people using it, room by room?
- ☐ Who owns this decision? (IT, facilities, workplace, mix) Is that clear to everyone involved?
- ☐ Does every room need the same standard, or do different room types need different things?
- ☐ Is this a full simultaneous refresh, or a room-by-room rollout over time?
- ☐ Are there rooms where future growth or reconfiguration, like combining or dividing a space, needs to be planned in now?
- ☐ Does the refresh need to integrate with anything already in place? (room booking systems, building access, existing AV?)
- ☐ Who needs to sign off before this moves from planning into purchasing?

03

Phase 3

Selecting & installing

This is where the plan becomes physical – worth checking installation doesn't quietly drift from what was actually specified.

- ☐ Does the proposed solution actually match what was scoped in Phase 2, room by room?
- ☐ Has a realistic installation schedule been agreed, including any disruption to room availability?
- ☐ Is there a plan for what happens while work is underway, alternate spaces, a staggered rollout?
- ☐ Has IT been looped in on network and integration requirements before installation starts, not after?
- ☐ Is there a clear point of contact if something doesn't go to plan mid-install?
- ☐ Has removal or disposal of the old equipment actually been accounted for?

04

Phase 4

Rollout & adoption

New technology only helps if people actually use it properly, this is where that gets tested.

- ☐ Have all systems been tested end-to-end in real conditions, not just switched on?
- ☐ Do staff know how to start a meeting in the refreshed rooms without needing help?
- ☐ Is there a simple way to report an issue, and does someone actually own fixing it?
- ☐ Has anyone checked whether usage patterns actually change after the refresh – are the right rooms getting used now?
- ☐ Was there a proper handover, or does support just quietly become assumed?
- ☐ Is there a plan to revisit in a few months and see what's working and what isn't?

What this adds up to

A refresh that starts with how rooms are actually used tends to end with rooms people actually use. One that starts with a spec sheet tends to end with expensive versions of the same problems. The equipment matters less than the questions that shaped the brief.

Want a second pair of eyes on where you're at?

1800 648 123 · hello@mergetechnologies.com.au

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