ANATOMY OF A GREAT Meeting

✋ STOP
Before you hit "send" on your Outlook meeting organizer CONSIDER
...is a meeting the best forum for what is needed?

Do you need a question answered?	Are there difficult or sensitive issues?	Is it a recurring meeting with no news or updates?
📞 PICK UP THE PHONE	MEET ONE-ON-ONE	✖ CANCEL

BEFORE

Determine
structure and purpose

- Who needs to attend?
- What is the objective?
- How much time is needed?
- What preparation will help?
- What is your role?
  1. Are you there to push a group to a decision?
  2. Are you responsible for making a decision?
  3. Are you seeking information?

Communicate
in advance

➡ Develop a written agenda; assign owners to each item

➡ Send agenda and supporting materials in advance

➡ Set expectations for in-person or video attendance

➡ Set context/framing for meeting
  (Why is this meeting being held?)

  🖱 by email if possible   📞 by phone if needed to engage key stakeholders

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DURING

① Start/Finish on time	② Assign a note-taker and a time-keeper	③ Provide context/framing at the outset *(Why are we here?)*

④ Manage the discussion

Making an ask?
Do it early, be specific
"To reach our objective, our team will need a piece of collateral to communicate the new vision."

Discussion wandering?
Bring it back to topic
"Great discussion, but I want to keep us focused on the issue at hand."

Want attendees to stay engaged?
Use active listening strategies
"I'm aware of the impact this has on your team."

Off-topic ideas coming up?
Put them in a parking lot
"Good point. Can we come back to it next time?"

People talking too long?
Set time limits
"I've asked each person to take no longer than 5 minutes to present their case."

Want attendees to feel invested in the outcome?
Acknowledge their mind-sets and interests verbally
"What I'm hearing you say is…"

⑤ Follow the agenda	⑥ Review next steps and establish accountability	⑦ End early
a. Set goals and objectives for the meeting and for each agenda item b. Establish owners for agenda items	*(Who will do what by when?)*	when possible to enable timely arrival at next appointment

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AFTER

FOLLOW-UP

➡ Send brief notes to meeting attendees and people who were absent, focusing on:

👍 Decisions made   Action items and owners

DEBRIEF

➡ Review what worked and didn't and note that for next time