ANATOMY OF A GREAT MEETING

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

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.”
   - 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 stay engaged?
     Use active listening strategies
     “I’m aware of the impact this has on your team.”
   - 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
   a. Set goals and objectives for the meeting and for each agenda item
   b. Establish owners for agenda items

6. Review next steps and establish accountability
   (Who will do what by when?)

7. End early when possible to enable timely arrival at next appointment

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