



MEETINGS THAT WORK

A Single 90-minute Webinar



3 KEY AREAS

What is the first step to having a productive, effective meeting?

BEFORE THE MEETING – PREPARE TO BE SUCCESSFUL

1. Below are some of the questions you should ask before you schedule a meeting. Which ones do you need to include in your preparation?

- _____ am I having a meeting?
- Could I handle this through an _____?
- What do I want to _____ with the meeting?
- _____ needs to be present to accomplish our goals?

2. Other steps you need to take or consider ***before*** the meeting:

- Ask participants for _____ in advance.
- Prepare an _____ and forward to participants far enough in advance to allow them to prepare and/or ask questions.

The agenda should include:

- Date, times (start ***and*** end times), location
 - Participants expected to attend
 - Topics to be discussed with a tag as to what category each topic is in:
 - FYI
 - For discussion and feedback
 - For developing a plan with action steps
 - For a decision
 - For brainstorming
 - _____ allotted to each agenda item
 - _____ responsible for each agenda item
 - Any items participants should bring to the meeting:
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DURING THE MEETING – WHAT IT TAKES TO MAKE IT WORK

1. _____ on time.
2. _____ the following roles (roles can and should be rotated):
 - _____ – keeps the meeting on track **and** on topic.
 - _____ – records what is discussed, what is decided, roles/tasks assigned, due dates, dates of status reports.
 - _____ attendant – puts issues that arise, but were not on the agenda, onto a flip chart “parking lot” to be addressed at another time or at the end of the meeting, if appropriate.
3. _____ the agenda.
4. When making decisions, consider the following:
 - Likely results of the decision being made
 - Costs involved
 - Time required
 - Competitive strategy (who **are** your competitors?)
5. _____ action steps on each item to individuals, with clear deadlines, times for status updates, and priority levels.
6. Allow _____ at the end of the meeting (include in the agenda) for questions and answers and a summary of action steps, roles, and deadlines. You can also request topic suggestions for the next meeting.
7. Consider reviewing the actual meeting _____ to determine what was done well and what could be improved at the next meeting.
8. _____ the next meeting if appropriate, with tentative agenda items from parking lot, which will be confirmed in advance of the meeting.
9. End on a _____.
10. _____ if you're done, even if it's earlier than expected.

AFTER THE MEETING – NOW WHAT?

1. Determine if the meeting was _____:
 - Were all expected participants in attendance – and on time?
 - Were all topics on the agenda covered – and **handled**?
 - Was the original objective met – the reason you had the meeting?
 - Was the timeline followed?

- Did everyone leave knowing what roles or tasks they were assigned and what deadlines have been established?
2. Prepare and _____ meeting notes with action steps: who, what, when and a date for status update and next meeting, if appropriate.
 3. _____ with the status updates to keep things moving forward. This may be done through one-on-one phone calls, emails, or face-to-face and may not require an additional meeting. Do make sure, though, that the updates ARE monitored.

What are TWO things I will do differently for the “before, during, or after” portion of my meetings?

1) _____

2) _____

WHY MEETINGS DON'T WORK

1. What are the results of ineffective meetings?

2. How much might ineffective meetings be costing your organization?

3. How can we overcome the most common issues of ineffective meetings?

#1 (no preparation) _____

#2 (no agenda) _____

#3 (unclear goals) _____

#4 (too long) _____

#5 (ramble) _____

#6 (no results from meeting) _____

#7 (no follow through) _____

Notes to self! _____

TIPS AND TECHNIQUES ~ PARTICIPANT RESPONSIBILITIES

What should you expect of participants at your meetings – and what should you do AS a participant?

1. _____ the agenda as soon as you receive it.
2. _____ any additional agenda items.
3. Prepare for _____ in the agenda with supporting documents, research, any questions, concerns, or ideas you have about a particular topic, etc.
4. _____ the agenda again before the meeting; make sure you are prepared.
5. Be _____ . Period.
6. Ask relevant questions during the meeting, _____.
7. Participate with _____.
8. Take _____ for action items.
9. After the meeting, _____ for status updates and complete assigned tasks on schedule.
10. Don't be _____; everyone's goal is to make the organization stronger.

ADDITIONAL TIPS TO ENSURE SUCCESS

1. The best times to hold meetings are _____ and _____
– before we're buried in work and after we've awakened from our after-lunch sluggishness.
2. Find ways to make sure participants arrive on time and _____:
 - ◇ Consider creating a "latecomer jar" to which participants who are late contribute a quarter. At the end of a month, the funds go to a charity or go into a "donut fund."
 - ◇ Use contests to generate ideas during brainstorming or problem-solving sessions.
 - ◇ Liven things up by passing the ball – toss a small, SOFT (!) ball from participant to participant; when a participant catches the ball, they comment or suggest an idea.
 - ◇ Pass out 5 pennies to each participant. They have to spend at least 1 of their pennies by offering an idea or suggestion, but can't spend more than 5 at one meeting (this encourages people to participate but not take over the meeting).
3. When you have a full agenda, make sure you list and deal with the most _____ issue first.
4. Require all _____ to be turned off during the meeting (gasp!).
5. Ask that participants have someone else _____ to intercom pages while they are in the meeting.

6. Consider how you will handle _____ from outside the meeting – “if someone isn’t bleeding or the building’s not on fire, don’t knock on the door!”
7. Ask _____ questions to draw out the thoughts of the participants.
8. Watch _____ to make sure everyone stays engaged.

So...the question is, what’s been missing in your meetings?

What specifically can you change to “make your meetings work?”

WORKSHEET FOR AN AGENDA FOR YOUR NEXT MEETING

Why? _____

Who? _____

When? _____

Where? _____

Topic	Category	Time Allotted	Person Responsible	Priority	

Other notes: _____

Team Meeting Agenda

[Date]

[Time]

[Location]

Meeting called by: _____ **Type of meeting:** _____

Facilitator: _____ **Note taker:** _____

Timekeeper: _____

Attendees: _____

Please read: _____

Please bring: _____

Agenda Items

TOPIC	PRESENTER	TIME ALLOTTED
✓		
✓		
✓		
✓		
✓		
✓		

Other Information

Observers:

Resources:

Special notes:

Meeting Title

MINUTES

[MEETING DATE]

[MEETING TIME]

[MEETING LOCATION]

MEETING CALLED BY	
TYPE OF MEETING	
FACILITATOR	
NOTE TAKER	
TIMEKEEPER	
ATTENDEES	

Agenda topics

[TIME ALLOTTED]

[AGENDA TOPIC]

[PRESENTER]

DISCUSSION			
CONCLUSIONS			
ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE	