






# 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?

<p>Do you need a question answered?</p>  <p>PICK UP THE PHONE</p>	<p>Are there difficult or sensitive issues?</p>  <p>MEET ONE-ON-ONE</p>	<p>Is it a recurring meeting with no news or updates?</p>  <p>CANCEL</p>
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## BEFORE

### Determine structure and purpose

 Who needs to <b>attend</b> ?	 What is the <b>objective</b> ?
 How much <b>time</b> is needed?	 What <b>preparation</b> will help?
 What is your <b>role</b> ?	

**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

<p><b>1</b></p> <p>Start/Finish <b>on time</b></p>	<p><b>2</b></p> <p>Assign <b>a note-taker and a time-keeper</b></p>	<p><b>3</b></p> <p>Provide <b>context/framing</b> at the outset <i>(Why are we here?)</i></p>
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## 4 Manage the discussion

<p>▶ <b>Making an ask?</b> Do it early, be specific <i>"To reach our objective, our team will need a piece of collateral to communicate the new vision."</i></p>	<p>▶ <b>Discussion wandering?</b> Bring it back to topic <i>"Great discussion, but I want to keep us focused on the issue at hand."</i></p>	<p>▶ <b>Want attendees to stay engaged?</b> Use active listening strategies <i>"I'm aware of the impact this has on your team."</i></p>
<p>▶ <b>Off-topic ideas coming up?</b> Put them in a parking lot <i>"Good point. Can we come back to it next time?"</i></p>	<p>▶ <b>People talking too long?</b> Set time limits <i>"I've asked each person to take no longer than 5 minutes to present their case."</i></p>	<p>▶ <b>Want attendees to feel invested in the outcome?</b> Acknowledge their mind-sets and interests verbally <i>"What I'm hearing you say is..."</i></p>

<p style="text-align: center;"><b>5</b></p> <p style="text-align: center;"><b>Follow</b> the agenda</p> <p>▶ Set goals and objectives for the meeting and for each agenda item</p> <p>▶ Establish owners for agenda items</p>	<p style="text-align: center;"><b>6</b></p> <p style="text-align: center;">Review <b>next steps</b> and establish accountability <i>(Who will do what by when?)</i></p>	<p style="text-align: center;"><b>7</b></p> <p style="text-align: center;"><b>End early</b> when possible to enable timely arrival at next appointment</p>
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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

