





ANATOMY OF A GREAT Meeting







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 attend?	 What is the objective?
 How much time is needed?	 What preparation will help?
<p>What is your role?</p>	
<p>1</p> <p>Are you there to push a group to a decision?</p>	<p>2</p> <p>Are you responsible for making a decision?</p>
<p>3</p> <p>Are you seeking information?</p>	

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



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

<p>5</p> <p>Follow the agenda</p> <p>a. Set goals and objectives for the meeting and for each agenda item</p> <p>b. Establish owners for agenda items</p>	<p>6</p> <p>Review next steps and establish accountability <i>(Who will do what by when?)</i></p>	<p>7</p> <p>End early 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 