Annatomy 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?)

BEFORE

- 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?)

- 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…”

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

- End early
  when possible to enable timely arrival at next appointment

- Follow the agenda
  Set goals and objectives for the meeting and for each agenda item

- Establish owners for agenda items

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

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