

simple intentions

BEST PRACTICES: EFFECTIVE MEETINGS

Maybe you cannot control the number of meeting requests you receive, but you can influence what happens in meetings, whether you request the meeting or accept it. Simply stated: Lead by example.

When you request a meeting...

- Be thoughtful about choosing a date and time. The first available hour is not always the best time for the content to be discussed.
- Create an agenda with expected time allotments for each discussion point. Include the agenda in the meeting invite.
- Clarify the people and/or roles who are required to attend. List others who are optional.
- Schedule your meeting to occur during your team's standard business hours, avoiding the lunch hour. Request flexibility for global meetings that need to occur outside of standard business hours.
- Start your meetings on time, even if not all attendees have arrived.
- Aim to end your meetings five minutes early. Giving attendees the extra time to check mail or get to their next meeting can ensure their attention during your meeting.
- Send pre-reads, reports and other materials at least two days in advance. Provide guidance on key points to review before your meeting.
- Begin your meeting by stating the objectives and expected outcome of the meeting.
- Enforce your agenda. Respectfully steer veering conversations back on track.
- Note action items during the meeting, whether in your notes or on a whiteboard. Attach an owner and due date to each action item.
- At the end of the meeting, summarize the discussion and outcome. Recap action items.
- Within one day following the meeting, send an email summary, including action items and next steps.

When you attend a meeting...

- Know your role and purpose in every meeting you accept. If you're unclear, ask the meeting organizer.
- Be empowered to decline meetings that do not include agendas or a clear purpose, or that are unrelated to your work commitments.
- If the meeting request includes pre-reads, schedule and commit time to prepare.
- Show up on time, with full awareness of the meeting agenda and goals.
- Do not do email, send texts or work during the meeting. If you must bring a device, mute it and use it only for taking notes or reviewing materials relevant to the meeting.
- Align your comments to your role and the meeting purpose. Avoid side conversations that steer from the agenda.
- Accept and commit to appropriate action items, taking into consideration your other commitments and deadlines. Be clear on what action is needed and by when.
- Following a meeting, be forthright in requesting notes and clarifications from the meeting organizer.