Anatomy 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?
  - Are you there to push a group to a decision?
  - Are you responsible for making a decision?
  - 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**

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?)
4. **Manage the discussion**
   - 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.”
5. **Follow the agenda**
   - Set goals and objectives for the meeting and for each agenda item
   - Establish owners for agenda items
6. **Review next steps and establish accountability**
   (Who will do what by when?)
7. **End early**
   when possible to enable timely arrival at next appointment

**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