

Holding Effective Meetings Guide

A tool to help plan and run effective meetings

1 – Determine the Goals of the Meeting

- What is the purpose of the meeting?
 - Is a decision needed? Is specific information/something being shared? Do ideas need to be developed?
- Do you really need a meeting? Can the meeting be replaced with an email?
- Apply the “2-3 Rule” – Ensure everyone attending the meeting is involved in 2-3 of the items in the agenda
- Consider the cost of the meeting by using the Meeting Cost Calculator

2 – Develop an Agenda for the Meeting

- Draft an outline of the meeting with topics for discussion
- Prioritize issues to be discussed & issues from previous meetings
- Identify who needs to be invited to the meeting, and follow up with participants to see if they have any topics to include in the agenda
- Determine what roles participants will have (facilitator, participant, note-taker, etc.) and confirm how much time each presenter needs
- Identify what read-ahead materials should be provided to attendees
- Ensure everyone who is invited understands why they need to participate
- Consider using the Holding Effective Meetings Agenda Template to help document goals, participants and discussion topics

3 – Send the Invitation for the Meeting

- Send the invitation to meeting participants at least 24 hours in advance
- Specify the date, time and location of the meeting; consider providing a method for remote participation
- Include a descriptive title detailing the meeting purpose and desired outcomes (e.g., ‘Meeting to review and finalize Project Charter’)
- Attach the agenda and any read-ahead materials or instructions for how participants should prepare for the meeting (e.g., bring your updates to Project Charter)

4 – Meeting Logistics

- Identify location with all needed equipment – arrive early to set up
- Consider nametags and/or seating arrangements
- Ensure room is comfortable and will fit all invitees
- Locate restrooms and exits as needed

5 – Hold the Meeting

- Start and conclude the meeting on time
- Briefly review the goals and agenda at the beginning of the meeting
- Follow the agenda throughout the meeting and keep the conversation focused on achieving the desired outcomes. Things outside of the agenda should only be noted for future meetings
- Be courteous, respectful and inclusive
- Request participants avoid using their phones during meeting unless needed for emergency purposes
- Encourage discussion and participation from all attendees
- Summarize the results of the meeting and review action items
- Conclude the meeting on time (early if possible)

6 – Provide a Summary

- Email a summary of the meeting (including action items) to participants within 24 hours
- Ask the team (and yourself) – How can we improve for next time?

How to use:

This guide can be used to help shape and hold productive meetings by encouraging adequate preparation, thoughtful facilitation and appropriate follow-through.

Key benefits:

- Provides guidance for planning, holding and closing a meeting
- Helps the facilitator of a meeting focus on achieving stated outcomes
- Delivers a clear meeting objective and agenda for all participants

Key tips:

- Avoid inviting participants who don't have a clear role or need to attend
- Develop a reputation for holding efficient and successful meetings – participants will remain more active and engaged if their roles are clear and contributions recognized
- Limit your meeting to the amount of time needed to meet the goals through an effective, focused conversation
- Consider alternative ways to hold meetings or limiting the number of days meetings are held
- Consider cost of meeting using the Meeting Cost Calculator

Facilitation Tips

A facilitator's role in a meeting is to keep the group on track. Meetings that get off topic or lose focus can be time-consuming and frustrating. Consider using the following talking points to keep the meeting moving forward smoothly:

- *Great idea, let's discuss that issue at next week's meeting/let's put that in the “parking lot” to look at later.*
- *This is a great discussion, but let's get back to the topic at hand/or talk about this outside the meeting.*
- *Thank you for your thoughts, does anyone have new ideas on this topic?*
- *I think we've heard everyone's thoughts, are we ready to make a decision?*
- *Let me make sure I am hearing you correctly... (summarize statement). Is that correct? Does anyone else have any input on this?*