**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?)

**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."

**FOLLOW-UP**

- Send brief notes to meeting attendees and people who were absent, focusing on:
  - Decisions made
  - Action items and owners

**AFTER**

- **Review** what worked and didn’t and note that for next time

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Before you hit “send” on your Outlook meeting organizer CONSIDER... is a meeting the best forum for what is needed?

- Do you need a question answered?
- Are there difficult or sensitive issues?
- Is it a recurring meeting with no news or updates?

**PICK UP THE PHONE**
**MEET ONE-ON-ONE**
**CANCEL**