

## 5 Phases of a Great Meeting

**1. Pre-Meeting Preparation.** What do we do before a meeting to assure it's a success?

- **Define objectives** (what will we do?)
- **Design an action-oriented agenda** based on client objectives, culture, and temperament.
- **Define process to be used** for each agenda item (**how** will we do it?) ie. discuss, brainstorm, small group work, etc.
- **Assign lead for each item** (**who** will lead each segment?)
- **Include time limits!**
- **Reminders.** Send out reminders, agenda, and pre-meeting information.

**2. Welcome.** What do we do to establish rapport, buy in, and introduce structure?

- **Who's here and why?** Introductions.
- **What...are we here to do?** Introduce agenda; ask for inputs and get consent to use it.
- **How...will we work together?** Review operating agreements, parking lot, and agree on a decision-making process.
- **Who...does what?** Assign meeting roles (participant, scribe, facilitator, etc.)

**3. Meeting Action Cycle.** How do we move through the agenda?

- **Stick to the agenda.** Cover only what's on the agenda.
- **Facilitate process** on each agenda item and stick to time limits.
- **Park important items** that aren't on agenda.
- **Close** each item; define and document follow up action.
- **Move to next item**

**4. Closure.** How do we effectively close a meeting?

- **Review** decisions and action items.
- **Clear** Parking Lot.
- **Facilitate public commitment** to action by specific individuals.
- **Plan** for follow-up actions, meetings.
- **Evaluate** meeting process.
- **Acknowledge** contributors.

**5. Follow-up.** How do we maximize the fruits of our labor?

- **Publish** action holder's name in bold in minutes within 24 hours.
- **Hold accountable.** Place action status updates on next agenda to be led by responsible party.
- **Be positive versus punitive.** Check in regularly with action holders to support and offer needed help and coaching.
- **Personalize actions and decisions.** Don't finalize action items or decisions without assigning an accountable party.

## Effective Meeting Checklist

Use these guidelines to help you manage the complexities of group process.	✓
<b>Pre-Meeting Preparation. What do we do before a meeting to assure it's a success?</b>	
<i>Identify key stakeholders and needs assessment process</i>	
<i>Establish clear goals and outcomes</i> in accordance with convener goals	
<i>Confirm attendance</i> of key decision makers and contributors	
<i>Define objectives</i> (what will we do?)	
<i>Design an action-oriented agenda</i> based on client objectives, culture, and temperament.	
<i>Define process to be used for each agenda item</i> (how will we do it?)	
<i>Assign lead for each item</i> (who will lead each segment?)	
<i>Include time limits!</i>	
<i>Send out reminders, agendas, and pre-meeting information</i>	
<b>Welcome Phase. What do we do to establish rapport, buy in, and introduce structure?</b>	
<i>Who's here and why?</i> Introductions	
<i>What are we here to do?</i> Introduce agenda, ask for inputs get consent to use it	
<i>How will we work together?</i> Operating Agreements, Parking Lot, Decision-Making process	
<i>Define meeting roles</i> (participant, scribe, facilitator, other)	
<i>Distribute summary of required data/information</i> (1 page per item max)	
<b>Meeting Action Cycle. How do we move through the agenda?</b>	
<i>Facilitate process</i> on each agenda item	
<i>Stick to the agenda.</i> Cover only what's on the agenda.	
<i>Part important items</i> that aren't on the agenda	
<i>Manage behaviors</i> in accordance with operating agreement	
<i>Achieve agreement on process</i> and facilitate it (periodically check satisfaction level)	
<i>Balance task, process, and relationships</i> (who, what, and how)	
<i>Seek full participation</i> (invite, incite, and inspire)	
<i>Unmask assumptions and personal interests</i>	
<i>Protect members from attack</i>	
<i>Shift conflicts to dilemmas</i> (redirecting energy from personal to impersonal)	
<i>Maintain group memory</i> (document results, actions, and accountability)	
<b>Closure and Follow-up. How do we effectively close a meeting?</b>	
<i>Review decisions and action items</i>	
<i>Clear Parking Lot</i>	
<i>Facilitate public commitment to action</i> by specific individuals.	
<i>Plan for follow up actions and meetings</i>	
<i>Evaluate meeting process.</i> Document improvements for future meetings	
<i>Acknowledge contributors and celebrate results</i>	
<b>Meeting Follow-up. How do we maximize the fruits of our labor?</b>	
<i>Publish action holder's name</i> in bold in minutes within 24 hours.	
<i>Hold accountable.</i> Place action status updates on next agenda to be led by responsible party.	
<i>Be positive versus punitive.</i> Check in with action holders to support and to offer help	
<i>Personalize actions and decisions.</i> Assign accountable party to every action item/decision	