Meeting Checklist
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Meetings Checklist

Success Factors

- Know overall goal, plan and establish a workable sequence.

- Right balance of off-line, in-meeting work.

- Know desired outcome, each meeting.

- Invite right people. (Keep stakeholders informed on information such as issues, actions completed etc.)

- Get people prepared!

- Plan ahead to use the right tools and processes in the meeting.

- Manage people during meeting

- Manage people, issues and actions before and after the meeting

Structure Meetings to Match Their Purposes

- Information Exchange

- Decision-making

- Design Review

- Reward/Recognition

- Problem solving

Put Your Meeting into Context

- What has gone on before this meeting?

- What needs to happen at this meeting?

- What will happen after this meeting?

- Do we really need this meeting?

  - Whole group *really* needed?

  - Disagreements involved?

  - Don't do all business in meetings!

Planning a Meeting

1. Determine overall goal and then plan the sequence.

2. Determine outcomes for each meeting (visible and invisible).

3. Invite right people. (Determine who should attend, who is optional, and attendee roles.)

4. Use right process, tools (meeting structure, content, processes, tools, ordered agenda).

5. Get people prepared (agenda, support material, pre-project issues as necessary)

Which People to Invite?

- Who has pertinent information?

- Who has authority to act?

- Who has stake in outcome?

- Who has pertinent expertise?

- Who has functional responsibilities?

- What people are necessary to reach goal?

- Who needs development in this area?

What the Leader Should DO During a Meeting:

- Maintain direction

- Keep emotional level low and on an even keel

- Set time limits on agenda items

- Push for conclusion

- Keep everyone in one discussion

- Solicit input from quiet people

- Protect the weak

- Watch for suggestion squashing

- Acknowledge competence

- Take minority discussions off-line

- Always maintain a respectful tone

- Take breaks when needed

- Summarize points, get consensus

- Adjourn if there isn't enough info to continue or if serious disruptions or conflict overwhelm the agenda

Be sure someone takes minutes:

- Ensure the "Group memory" gets created properly
- Ensure right level of detail
- Keep key items visible on flipchart or pasted on the wall as well as marked for minutes
- Assign action items only to those present
- Publish Minutes and action items immediately

Leader DON'TS

Exercise too much position power. Instead, be sure to focus on leadership, persuasion, mediating, active listening.

- Don't over-control the meeting process. (Instead, facilitate and preserve neutrality. Field questions and avoid voicing your own strong opinions.)

- Don't force decisions.

- Don't micro-manage.

Participant Responsibilities

✓ Discuss any major issues with leader before meeting

✓ Be positive

✓ Be proactive: state position and offer alternatives to keep it positive

✓ Listen

✓ Contribute

✓ Don't interrupt

✓ Don't get personal

✓ Stay on the subject

✓ When convinced of a new position, say so

✓ Acknowledge the competence of others

Behavioral Tips for a Meeting Leader

- **Praise in public. Criticize in private.**

- Deal with problems quickly, directly, diplomatically.

- Watch your tone of voice!

- Periodically pause and ask for input on progress.

- Adjourn the meeting and reconvene later, if needed.

Closing

As meeting progresses, get closure on each item.

At end, review all action items:

- Single assigned responsible owner
- Establish completion date

Give a final summation.

Schedule follow-up meetings or actions now.

Follow-up

o Publish minutes promptly.

o Congratulate contributors.

o Check with participants:

- Engaged in heated debates
- Who have compromised positions
- Who displayed inappropriate behavior

    Check on action item work progress to commitment.

- If action is required from non-attendees, seek their commitment before publishing minutes, or note items on which they have not been consulted. The noted action item remains yours until accepted.

o Seek feedback and coaching, as necessary.

o Do not ignore warning signs.

o Focus on growing new skills.

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