

A better meeting in 3 acts



Before: Prepare

Preparation is key to an effective meeting...

- **Create an agenda** with a clear **purpose** (why are you holding this meeting?) and **desired outcomes** (what decisions, actions or behaviors must come from this meeting?)
- **Invite the right people** who can achieve your desired outcomes.
- **Send agenda at least 24 hours** before the meeting (include in your meeting invite). Participants should know exactly why they're invited and be able to gauge whether they're the right person to be there and whether the meeting was productive based on your agenda and outcomes.
- **Include pre-reads with the agenda.** Share content that needs to be reviewed prior to attending the meeting — don't waste time reading during a meeting.



During: Focus

Keep your eye on the prize...

- **Take meeting notes.** Identify someone to record notes at the start of the meeting.
- Create detailed notes with clear actions and responsibility — **who will do what by when?**
- **House meeting notes in a shared doc** or other collaboration tool that can be accessed by attendees at any time. This is essential for accountability and to include team members who were unable to attend this meeting.
- **Consider recording important meetings.** Include a link in the meeting notes for those who were unable to attend.
- **Involve!** Draw all voices to participate. Invite robust dialogue if necessary.
- **Ask!** If something's not clear, the group has gone off agenda or next steps haven't been identified, ask about it.



After: Learn

Evaluate, adjust and hold accountable...

- **Ask attendees for feedback** on your meeting — was it a good use of their time? Ask them directly, or send a slack poll after the meeting.
- **Evaluate meeting effectiveness.** (Did you accomplish your purpose? How well did people participate? Did you identify action items?) Adjust the next meeting as needed.
- **Apply learning.** Make changes to future meetings based on your evaluation. (Is this meeting still needed? Could it be asynchronous collaboration instead? Is the length and frequency right? Did everyone need to be there?)
- **Use shared meeting notes.** Continue to collaborate on a shared document. Ask questions and post status of actions.
- **Hold accountability.** Set expectations for follow up and then do it.