



6 Elements for Great Meetings

6 Elements	Before Meeting	During Meeting
<i>Purpose</i>	What is the purpose of the meeting? How will this meeting serve the company and its stakeholders? What are the specific outcomes & products? Who is the meeting owner? Is there a better way (than a meeting) to accomplish this? What is my intention for this meeting/group?	<ul style="list-style-type: none"> • Set context • <i>Name the purpose</i> • Check for understanding and agreement • Identify meeting owner
<i>Right People</i>	<ul style="list-style-type: none"> • Who has the needed expertise? • Who are the decision makers? • Whose buy-in do I need • Whose authority do I need? • Who are my partners in this? 	<ul style="list-style-type: none"> • <i>Explain why individuals are there</i> • Check for understanding and agreement.
<i>Decision Making</i>	<ul style="list-style-type: none"> • What decisions need to be made? • Who will make them? • How will they be made? • When will they be made? 	<ul style="list-style-type: none"> • <i>Name decisions on the table</i> <ul style="list-style-type: none"> • Who is making the decision • How it will be made • When it will be made
<i>Agenda</i>	<ul style="list-style-type: none"> • What are the topics? • What is the sequence of topics? • Who owns each topic? • How long will each topic take? • What is the outcome (overall and for each topic)? • What preparation, pre-work or supporting information might be needed? 	<ul style="list-style-type: none"> • Review the agenda • <i>Name each conversation with outcome desired, time and owner</i> • Clarify decisions • Keep conversation on track • Name when the conversation strays • Summarize progress • Encourage input/challenge
<i>Action</i>	<ul style="list-style-type: none"> • Review previous accountabilities • Review work progress and status 	<ul style="list-style-type: none"> • Record decisions taken • <i>Record next actions with who, what, when</i> • Identify follow-up mechanism
<i>Evaluation</i>	<ul style="list-style-type: none"> • Review previous meeting evaluations • Assess strength of group participants 	<i>Conduct an evaluation</i> for: <ul style="list-style-type: none"> • task results • process efficiency • satisfaction

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MEETINGS PROTOCOL TOOL

To use this tool:

1. Review the "Before Meeting" sections and *design* the meeting by answering the questions posed in each Element.
2. Invite meeting participants - include a clear statement of the meeting's purpose and overall agenda.
3. Meeting leaders prepare for the meeting by reviewing the "During Meeting" section – particularly the behaviors highlighted in **bold**.
4. At the meeting, have the "During Meeting" behaviors visible to all.

Purpose: All meetings require a purpose, outcome or goal. The purpose of a meeting is the articulation of what is to be accomplished or achieved as a result of gathering a group of people. The purpose must be clearly stated and understood by the group before any work begins. Prior to convening a group, you must answer the questions "Why meet?" and "Is there another way to get the same outcome?"

Example: The purpose of this meeting is to reach a final decision about resource requirements for the XYZ project.

Right People: Selection of the appropriate people to attend your meeting may be the most important factor in the ultimate success of the meeting. The costs in time and efficiency of having too many – or the wrong people in the room can be enormous. For each participant, you must be able to specifically answer the question "What essential value does this person bring to the table – at this time?" The rationale for each included participant must be absolutely clear to all – and should be stated at the beginning of the meeting. As a guideline, decision-making meetings should rarely have more 10 participants.

Example:

Bob – technical expertise on the system in question
Sally – has ultimate financial responsibility & project manager
Mark – liaison with the consulting group
Susan – key project stakeholder and "customer"
April – logistical coordination and communication

Decision-making: Effective meetings provide clear roadmaps for any decisions that need to be made during the meeting. This requires a clearly delineated process, which



includes what decision is to be made, who the decision maker is, what process will be used to make that decision and when the decision will be made. This must be made explicit before any work commences on a topic. This clarity allows all group members to understand their role in any discussions impacting a decision.

Example: We need to reach a decision to day about the number of staff who will be assigned to this project. Joe is the decision maker but he would like input for each of you requiring your staffing needs. He will gather the input here and then make a decision by Friday and notify you by email no later than next Friday.

Agenda: A planned, written agenda creates a structure – and sequence of conversations – that will ensure that meeting outcomes are achieved in the time allotted. Communicating the agenda to each participant prior to the meeting (if possible) and during the meeting – ensures alignment to the meeting’s purpose and clarity on the process.

Example:

One-hour project meeting
5 minutes to review progress to date
15 minutes to identify major challenges or obstacles
20 minutes to brainstorm solutions to 2 major challenges
15 minutes to decide on next actions (with accountabilities and time frames)
5 minutes to schedule next meeting and close

Action: The work of meeting will only move forward if there is full understanding and agreement about what will happen after the meeting by whom, by when and there is a clear accountability mechanism identified. A meeting should begin with a review of all previously agreed upon action and must conclude with a new list of agreed upon actions.

Example: We have identified three tasks to be done:

- Anne will draft a memo by Sept 1 and send it to all members of the committee by Sept 2.
- Sally will gather data from the finance department and analyze spending patterns by July 6th. She will bring the analysis to the next meeting which is scheduled for Sept 12th.
- Joe will make staffing decisions by Friday and send out an email to all group members by 5:00PM on Friday



Evaluation: Simple, brief evaluation of meetings on a regular basis leads to dramatic increases in meeting effectiveness, efficiency and satisfaction. Evaluation is the basis for any continual improvement process. A simple question to the group, such as “what worked well at this meeting? Or “what do we want to do in the future to improve our meetings?” will have enormous impact on future productivity.

Examples:

Task evaluation: “How well did we accomplish the objective of this meeting?”

Process evaluation: “What can we do in the future to improve our meeting efficiency?”

Satisfaction evaluation: “How can we use your skills and resources more effectively in the future?”

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