
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 today 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 regarding 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.



Meetings Protocol Tool

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?”

WANT TO USE THIS TOOL IN YOUR E-ZINE OR WEB SITE? You can, as long as you include this complete blurb with it: PowerfulWork consultants Tom Kornbluh and Marcia Feola are authors of the forthcoming book Impact! and offer consulting, training and executive coaching to bring transformational meetings to organizations. If you're ready to put together your breakthrough leadership strategy and lead great meetings, get your FREE tips, templates, protocols and best practice resources now at <http://www.powerfulwork.com/events-resources/>.