



Leading Better Meetings

TEAM MEETING GUIDE

> Your first step to planning and facilitating more productive meetings

Leading Better Meetings

How many times have you found yourself sitting in a meeting, struggling to pay attention, checking social media or answering other emails, and thinking about all the other, more productive ways you could be spending your time?

Almost all organizations struggle to keep their meetings quick and effective. It's certainly not easy. But with a little intention, you can begin practicing the art of hosting more productive, fulfilling meetings. Practicing a little today will have a ripple effect that improves your team communication and collaboration in the long run.

Best Practices for Better Meetings

Do:

- ✓ Take time to think about and plan your meeting ahead of time
- ✓ Create a clear, concise agenda with a specific goal
- ✓ Stick to your agenda as much as possible
- ✓ Start and end on time

Don't:

- ✗ Hold a meeting strictly to share information
- ✗ Invite teammates without a specific reason for them to be there
- ✗ Forget to check in and check out *(Learn more on page 5)*
- ✗ Leave a meeting without assigning action items to specific people



What if you're invited to an unnecessary meeting?

If you are invited to a meeting and don't know what role you are expected to play, ask the meeting organizer what your expected contributions are.



If it is within the norms of your organizational culture, politely decline attending meetings where you have no role to play.



Plan Your Meeting

1 Define the overall purpose of this meeting

Check all that are appropriate:

- Gain consensus or align the team
- Brainstorm, problem solve, or talk through ideas
- Plan out work
- Share status updates
 -  **MEETING DANGER ZONE!** Consider a 15-minute stand-up meeting instead.
- Share other information
 -  **MEETING DANGER ZONE!** If you're holding this meeting predominantly to share information, there might be a better way. Consider sharing a note via email, Slack, or your project management system. If you're worried about people not reading it, assign a to-do in your project management system.
- Other _____

2 Brainstorm

- What could you try that would help you accomplish the above, but in less time?
- How could you switch things up? *A few examples of creative ideas, backed by research, could include incorporating a brief one-minute meditation or breathing exercise at the beginning of the meeting, trying a walking meeting, or hosting the meeting outside or in another nontraditional meeting location.*

3 Define a specific goal

- What do you want to accomplish? What do you want people to walk away with?
- Why is it important?

4 Write out your guest list

Make sure everyone at the meeting has a clear role to play.

Every person at the meeting should be a stakeholder in the process.

5 Build your agenda

Use the worksheet on the next page to plan and share your agenda.

6 Invite participants

Share your agenda, expectations, and action items (e.g. if you'd like participants to review the agenda ahead of time) via email or your project management platform before your meeting, preferably ~1 day ahead of time.



MEETING NOTES | WORKSHEET

Topic	
Date	Location
Notes	
Main Points	Action Items & Next Steps <ul style="list-style-type: none"><input type="radio"/> _____ <i>Assigned to:</i><input type="radio"/> _____ <i>Assigned to:</i><input type="radio"/> _____ <i>Assigned to:</i><input type="radio"/> _____ <i>Assigned to:</i><input type="radio"/> _____ <i>Assigned to:</i><input type="radio"/> _____ <i>Assigned to:</i>



Facilitate Your Meeting

1 Start on time

This shows attendees that you respect their time.

2 Thank everyone for attending

Remind them of ground rules, for example, ask them to tuck their devices away.

3 Check in

Ask everyone to provide a brief, 30-to-60 second check in of what's on their mind or what has their attention. Volunteer to go first.

4 Assign roles

Make sure someone is responsible for taking notes and making sure all updates and action items are entered into your project management system if applicable.

5 Review agenda together

Although it can feel unnecessary, take the time to review the agenda at the very beginning of the meeting. It will ensure you're all on the same page. Ask if anyone would like to propose changes or would like to add or modify anything. This is your meeting, so accept or decline suggestions based on your gut.

6 Stick to your agenda

Sometimes it can feel overly rigid to stick to an agenda, but your attendees will thank you. See the sidebar *Meeting Pitfalls* for suggestions to keep your meeting on track.

7 Capture follow-up items for every topic

Use the *Meeting Notes Worksheet* on page 5 to capture main points, action items, and who owns them.

8 Check out

End the meeting just how you started. Ask everyone to provide a brief 30-to-60 second check out on how they are feeling at the end of the meeting.

9 End on time



Meeting Pitfalls

Getting derailed:

It happens to the best of us. Someone brings up something that is related to what you're talking about, but it leads you away from accomplishing the main goal of your meeting.

When this happens, get back on track by:

- Politely acknowledging that you're getting off topic a little bit
- Asking to schedule another time to dig into the topic with specific stakeholders and taking it as an action item to schedule a new meeting

If there's no consensus or a hot debate:

You need to end with a decision, but the team is at an impasse or divided into multiple camps. Is there one decision maker in the room, or does your organization require group consensus?

Call on key decision makers and address the tension as objectively as possible.



After the Meeting

1 Follow-up

Within 24 hours, send a follow-up to everyone who attended highlighting what was accomplished, what the follow-up steps are, who is responsible, and any deadlines.

2 Ask for feedback

Ask participants for feedback on the meeting, so you can continue honing your skills as a facilitator. Continue practicing the art of planning to gain more comfort and confidence in leading more effective, efficient meetings.

3 Try something new

For one week, challenge yourself to take handwritten notes in every meeting, leaving your phone and laptop behind. Research shows that doing this will limit distractions and the urge to multi-task, promote active listening, and help you process and remember the most important information. After a week of putting pen to paper, reflect on your experience and commit to a personalized strategy for note-taking.

- * Use the meeting notes worksheet on page 7 to stay organized, capture main points, and assign action items.

Happy Strategy is a creative culture agency based in Philadelphia. We help companies more thoughtfully design their workplace culture and processes to be more human, more supportive of individual team members, and more successful in the long run because of it.

To learn more about us or to schedule a introductory conversation, email julia@thehappystrategy.com.

