Anatomy of a Great Meeting

STOP — Before you hit "send" on your Outlook meeting organizer CONSIDER
...is a meeting the best forum for what is needed?

Do you need a question answered?	Are there difficult or sensitive issues?	Is it a recurring meeting with no news or updates?
PICK UP THE PHONE	MEET ONE-ON-ONE	CANCEL

BEFORE

Determine structure and purpose

- Who needs to **attend**?
- How much **time** is needed?
- What is the **objective**?
- What **preparation** will help?
- What is your **role**?
  1. Are you there to push a group to a decision?
  2. Are you responsible for making a decision?
  3. Are you seeking information?

Communicate in advance

➤ Develop a **written agenda**; assign owners to each item

➤ **Send agenda** and supporting materials in advance

➤ **Set expectations** for in-person or video attendance

➤ **Set context/framing** for meeting
(Why is this meeting being held?)

- by email if possible
- by phone if needed to engage key stakeholders

DURING

1. Start/Finish **on time**
2. Assign **a note-taker and a time-keeper**
3. Provide **context/framing** at the outset *(Why are we here?)*

4. Manage the discussion

▸ **Making an ask?**
Do it early, be specific
"To reach our objective, our team will need a piece of collateral to communicate the new vision."

▸ **Discussion wandering?**
Bring it back to topic
"Great discussion, but I want to keep us focused on the issue at hand."

▸ **Want attendees to stay engaged?**
Use active listening strategies
"I'm aware of the impact this has on your team."

▸ **Off-topic ideas coming up?**
Put them in a parking lot
"Good point. Can we come back to it next time?"

▸ **People talking too long?**
Set time limits
"I've asked each person to take no longer than 5 minutes to present their case."

▸ **Want attendees to feel invested in the outcome?**
Acknowledge their mind-sets and interests verbally
"What I'm hearing you say is..."

5. **Follow** the agenda
- Set goals and objectives for the meeting and for each agenda item
- Establish owners for agenda items

6. Review **next steps** and establish accountability
(Who will do what by when?)

7. **End early** when possible to enable timely arrival at next appointment

---

AFTER

FOLLOW-UP ➡ **Send brief notes** to meeting attendees and people who were absent, focusing on:
- Decisions made
- Action items and owners

DEBRIEF ➡ **Review** what worked and didn't and note that for next time

---

EAB

We help schools support students from enrollment to graduation and beyond
eab.com