Effective Meetings

Meeting Checklist: A process to follow when you plan a meeting:

**When to hold a meeting**

There are five reasons to have a meeting. Make sure everyone in the meeting is clear on what they’re there to accomplish:

1. To give information
2. To get information
3. To brainstorm (develop options)
4. To make a decision
5. Engage in warm magical human contact :-)

Sometimes a meeting may incorporate several or all of the above, the only important thing to remember is that everyone attending has a shared understanding of why they are there.

**How to hold a meeting**

**Before**

Identify the purpose and create an agenda
Invite the appropriate people and assign roles
Distribute any prep materials as appropriate (at least 24 hrs beforehand for any pre-reading)

**During**

Start on time
Set meeting ground rules
Review purpose and agenda
Review roles
Agreement on action items and responsibilities
End on time

**After**

Distribute notes

Follow-up and follow through!

Strategies to follow when you’re a meeting participant:

Show up on time
Come prepared
Before the meeting starts, ask yourself these questions

- Do I know what the purpose of this meeting is?
- Does the meeting have an agenda?
- Do I know why I’m here? i.e. what’s my role?
Ask topic and audience appropriate questions
Consider others’ opinions and time
Give appropriate feedback to meeting organizers (continuous improvement and development) when warranted.

Key Point!

If you remember just one thing from this job aid remember this:

PPC

Purpose—what’s the purpose of this meeting?
Process—what process are we going to follow?
Content—what content should we address?

Too often groups jump straight to content in meetings without clarifying purpose and process beforehand.

Feedback on this job aid? Contact Sarah Staley @ 5-4741

“Our meetings are held to discuss many problems which would never arise if we held fewer meetings.”

- Ashleigh Brilliant

Why a job aid?

Meetings are a great tool, if you need to brainstorm with your colleagues, discuss an issue or problem solve, your first instinct will likely be to call a meeting.

Too often though we find ourselves wasting hours or even days in futile meetings – meetings where there is no clearly defined purpose, process or outcome, where people arrive late and where roles are unclear – we’ve all experienced at least one of those types of meetings!

Here at Harvard we all play a role in effective meeting management and participation. This job aid will serve as a useful reminder to help ensure we make most effective use of our meeting time together.

Follow-up and follow through!
Meeting Agenda Template

XXX Meeting

Date, Time

<table>
<thead>
<tr>
<th>Topic</th>
<th>Owner</th>
<th>Allotted Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agenda Review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Confirm and/or Introduce Attendees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Review agenda</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Clarify Roles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agenda Item 1</td>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Agenda Item 2</td>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Agenda Item 3</td>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Meeting Wrap Up</td>
<td>Scribe</td>
<td></td>
</tr>
<tr>
<td>• Confirm Decisions</td>
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<td></td>
</tr>
</tbody>
</table>

Did you know?

Not all meetings need to be 60 minutes in length :)

Minutes are not always required—if you’re not sure, ask the meeting organizer for clarification.

Meeting Minutes Template

FROM:                                   Re: XXX Meeting Notes    Date:
Attendees:                              CC:

Decisions Reached

<table>
<thead>
<tr>
<th>Topic</th>
<th>Decision</th>
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<tbody>
<tr>
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</table>

Action Items

<table>
<thead>
<tr>
<th>Items</th>
<th>Assigned To</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Meeting Notes

Agenda
Agenda Item 1
   Agenda Item 1 Notes
Agenda Item 2
   Agenda Item 2 Notes