Anatomy of a Great Meeting

**BEFORE**

**Determine structure and purpose**

- Who needs to attend?
- How much time is needed?
- What is your role?
- What is the objective?
- What preparation will help?

<table>
<thead>
<tr>
<th>1</th>
<th>Are you there to push a group to a decision?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Are you responsible for making a decision?</td>
</tr>
<tr>
<td>3</td>
<td>Are you seeking information?</td>
</tr>
</tbody>
</table>

**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**

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

**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."
- 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."

**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

**AFTER**

- End early when possible to enable timely arrival at next appointment
- Review next steps and establish accountability (Who will do what by when?)
- Review
- Send agenda and supporting materials in advance
- Set expectations for in-person or video attendance

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