



General Considerations for Great Meetings

Overview

Meetings can help us develop mutual understanding, gather collective input, explore ideas, create plans or learn something new. In the process, relationships develop and action can be generated. Every meeting is different. While there is no 'one format', the following principles can help you create meetings that are inspiring and effective, and that in the process help build your team and internal 'brand'.

What and how you do everything before during and after meetings impacts participants and should support the outcome you intend both in your organization, and from the meeting.

BEFORE MEETING

Define Today's Purpose for Tomorrow's Outcome

Why are you gathering? What are your initial goals?

How does this meeting fit into your immediate future goals?

How might what you are creating help others?

* Engage people in the outcome, then in the project.

Match Place and Format with People and Purpose

What place matches the spirit of the meeting and the 'style' of the people?

What format and time frame is a simple, enjoyable way to achieve your intended outcome?

Who will facilitate the meeting? You as the leader? Someone in your group? An outside facilitator?

(Choose an outside facilitator when you need to participate fully in the session or when it's conflictual.)

* Choose a place that is comfortable, will help you accomplish your goals, and matches your mission.

Build Relationships

Invite input while offering ideas.

(The more complex the issues, the more pre-meeting input from participants.)

Talk with others. Listen to what they want to accomplish.

Create a meeting outline. Distribute and ask for any additional ideas or changes.

Build space into your format for each participant to engage personally and to contribute their ideas.

Invite people to the meeting with enough lead time to demonstrate respect for their work and home lives.

* Model the spirit, openness, connection and efficiency you aim to inspire.

Create Space to Support Outcome

Create a welcoming, peaceful, productive-ready space.

Set the room up well prior to the session. Do so as a ‘host’ who cares about his/her ‘guests’.

Use a format where people can see each other and all focus on the goals, not on the leader or facilitator.

Post or print the agenda, and if appropriate, Dialogue Agreements. (If printed, distribute on chairs prior to people’s arrival.)

Provide paper and pencils for notes.

Set up and check all technology ahead of time.

Provide light refreshments if appropriate.

Center yourself. Review your agenda. Relax.

Welcome participants as they arrive.

* Relax and focus in the open, welcoming, productive-ready space you’ve created.

DURING THE MEETING

Inspire Trust & Create Community

Start and end on time.

Welcome people. Name purpose and goals of session.

Ask group if goals work for them. Anything to add or adjust?

Clarify your role, how you will be participating in the meeting.

Take a moment to focus participants’ attention to the meeting, leaving behind other distractions.

(Facilitators: Adjust the following to match / sound normal in the context, but here’s the idea.

We all have a lot going on. Let’s take a minute of quiet to bring ourselves here. If you wish, simply focus your attention down into your body. Enjoy breathing. (pause) Feel your feet on the ground. (pause)

Feel yourself supported right where you are without effort. (pause) Open your heart and mind. (pause for another 20 or 30 seconds) Ok. Everyone ready?” The energy in the room will become more relaxed and cohesive. People will have access to their wisdom, in addition to their ideas. This creates better outcomes.)

Introduce format of the meeting.

Ask participants to briefly introduce themselves (as appropriate).

Introduce, invite input, and secure commitment to uphold Dialogue Agreements. (if appropriate to context).

Follow agenda you’ve created. (If you need to adjust, do so transparently *with* participants’ agreement.)

List related but not ‘on topic’ ideas or questions on a “Treasure Chest” list to address at a later date.

At close of meeting, review goals, what you’ve accomplished, and Next Steps.

Invite participants to briefly reflect on their experience at the meeting. (One or two words – or one breath)

AFTER THE MEETING

Move Forward Together

Send a follow-up note with Thanks and Next Steps. Include timing, action and person responsible.

Send brief follow-up as next steps are accomplished.

Meet as needed to celebrate accomplishments, remove roadblocks, and address emerging opportunities.