

# Effective Meeting Tools

## Checklists to help drive effective meetings

### Effective meetings are not accidental

This document contains tools designed to help drive effective meetings. Whether you are the meeting owner, coordinator, presenter or participant there are several things you should keep in mind before, during and after the meeting.

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**Owner**

Initiates, defines & manages the meeting



**Presenter \***

Takes actions to support specific agenda item(s)



**Coordinator \***

Takes actions to complete logistical arrangements



**Participant \***

Takes actions to support the purpose & objectives

**Before the Meeting (B)**

**During (D)**

**After (A)**

Defining the  
Need

Planning the  
Meeting

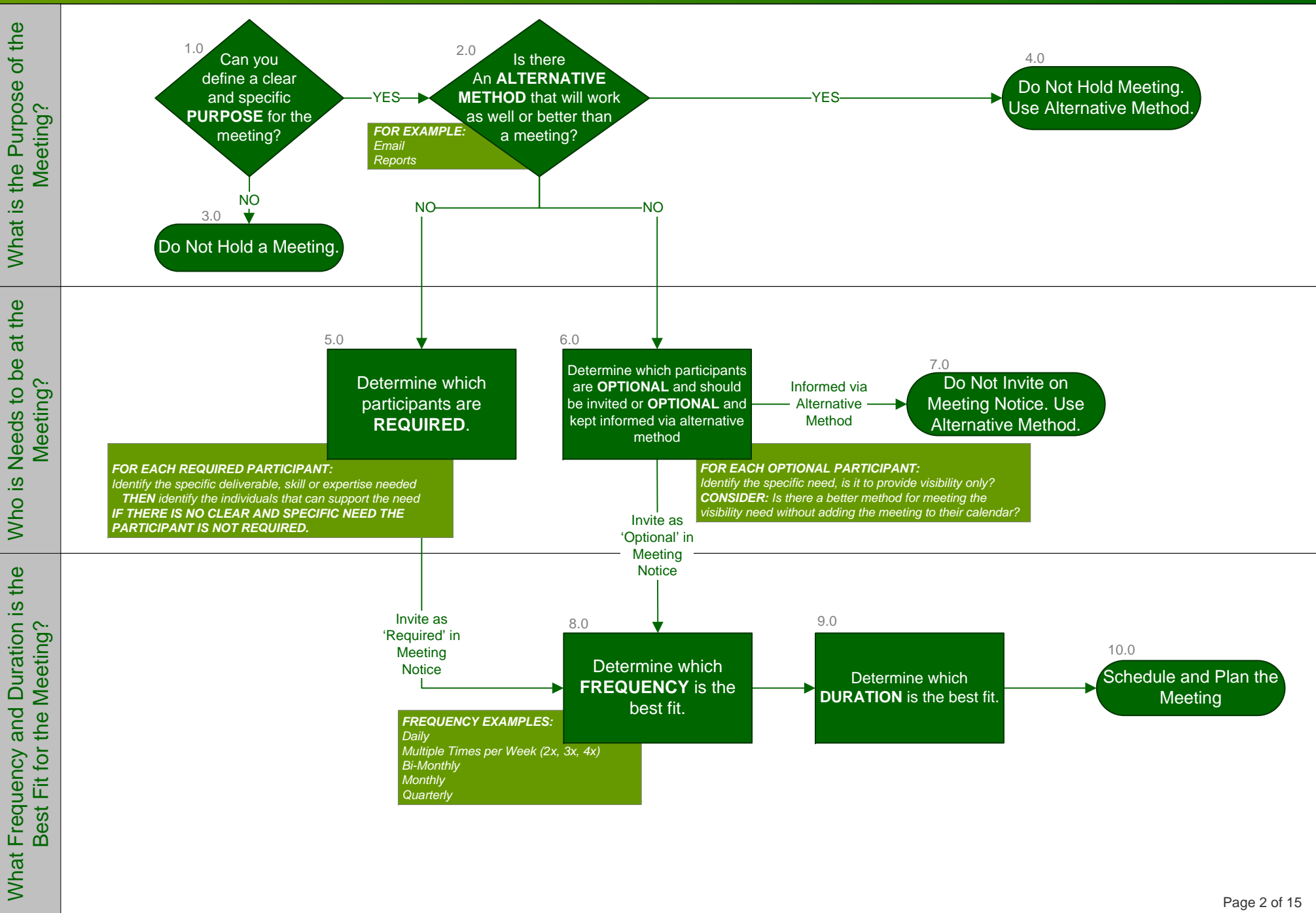
Understanding  
Role Expectations

Having the  
Meeting

Meeting  
Follow-up

# New Meeting Decision Tree: Is this New Meeting Needed?

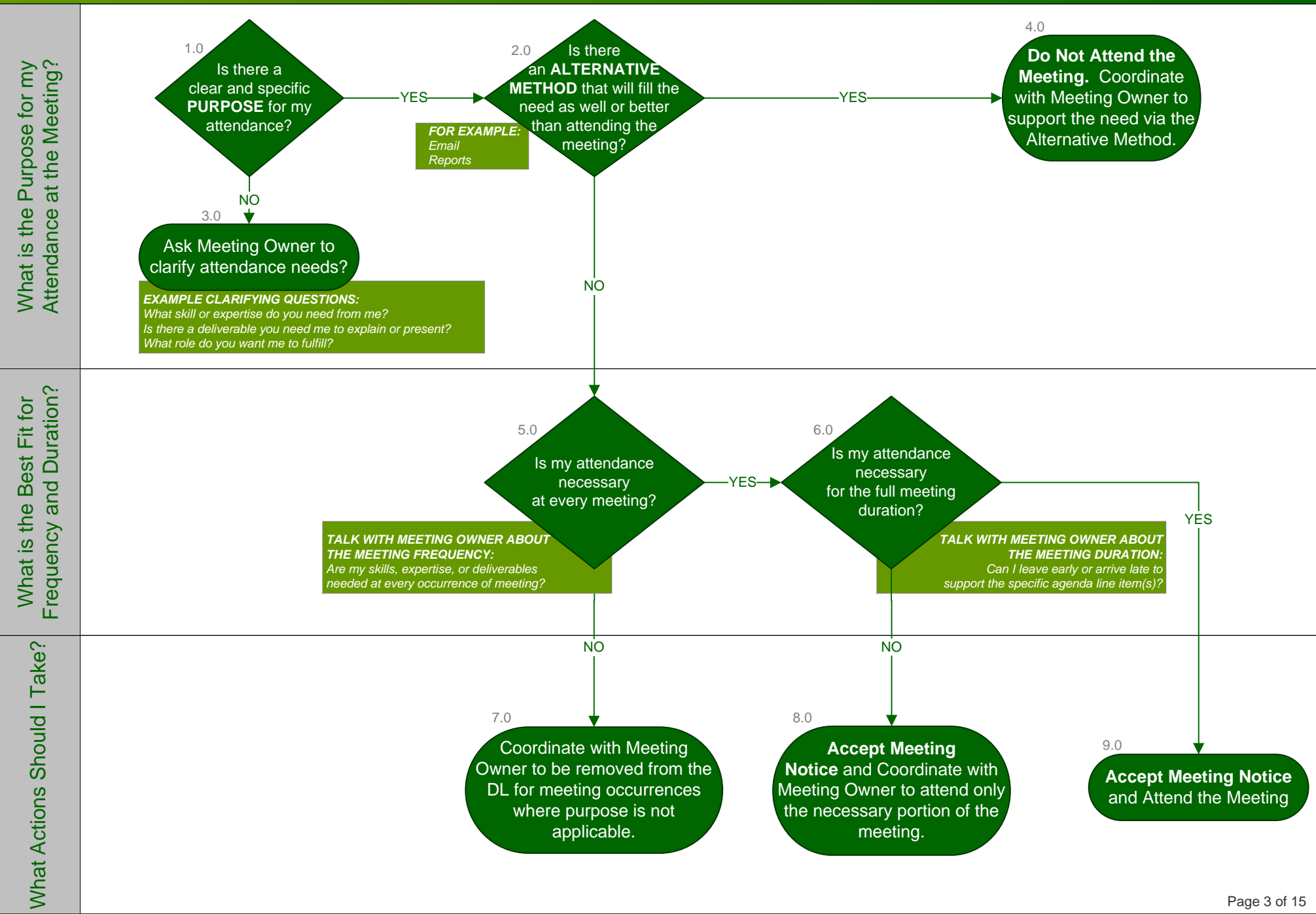
ROLES: Owner PHASE: Before



# Participant Attendance Decision Tree: Should I Attend The Meeting?

ROLES: Participant

PHASE: Before



# Checklist: Planning an Effective Meeting

ROLES: Owner and/or Coordinator

PHASE: Before

## Agenda Development Activities



### Plan the preliminary meeting agenda

- Identify the objective(s) of the meeting (Objectives are specific to the single occurrence of the meeting and therefore may differ from purpose if the meeting is recurring)
- Identify the agenda item(s) that support the meeting objective(s)
  - If meeting is recurring, add an opening agenda item for review of previous meeting notes and/or action items
- Consider adding a closing agenda item to allocate time for:
  - Review of significant agreements, discussion points or action items
  - Process check with the meeting attendees to solicit feedback regarding the meeting mechanics
  - 'Around the Room' or open floor to provide attendees an opportunity to voice concerns, comments, etc.
- For each identified agenda item determine:
  - Who should be the presenter?
  - What is the desired outcome (e.g., reach a decision, brainstorm two alternative solutions)?
  - How much time should be allocated?
- Identify the required and/or optional participants (e.g., consider diversity of skill, expertise or experience)
  - Will any of the participants be virtual? If yes, refer to "Planning an Effective Virtual Meeting" checklist
- Identify preliminary meeting room requirements (e.g., size, location, equipment, availability)



### Route the preliminary meeting agenda to key participants/stakeholders for input

- Verify commitment from each identified presenter
  - The presenter should identify the following for each agenda item he/she is responsible for:
    - What supporting information will be distributed to the participants in advance of the meeting?
    - What preparation actions should participants complete prior to the meeting?
    - What type of discussion is the agenda item (e.g., decisional, info sharing, problem solving, governing)?
    - What equipment is needed in the meeting room (e.g., projector, computer, whiteboard)?



### Finalize and distribute the meeting agenda

- Integrate key participant/stakeholder input and update meeting agenda
- Identify any new requirements (e.g., participant additions or deletions, meeting room size, equipment needs)

## Logistical Activities (Owner may delegate some activities to coordinator)



### Send a preliminary meeting notice

- Notify participants so meeting time is reserved on their calendar
- Communicate purpose of the meeting



### Arrange for the meeting area and other related logistical requirements

- Logistic requirements may include:
  - Meeting room with all the needed equipment (e.g., projector, computer, speakerphone, whiteboard)
  - Virtual or telecon information (e.g., audio conference, Webex) refer to "Planning an Effective Virtual Meeting" checklist
  - Identifying how the meeting will be run (e.g., location for presentation files, who will run the equipment)
  - Preparation of material for use or distribution at the meeting (e.g., photocopying handouts)



### Once meeting agenda is finalized update meeting notice

- Update the meeting notice as follows:
  - Meeting objective(s) and type (e.g., decisional, info sharing, problem solving, governing)
  - Agenda items (description of item, presenter, allocated time, type of discussion)
  - Details for each agenda item (supporting information, preparation actions, desired outcome)
  - Meeting location
  - Meeting start time/duration
  - Virtual meeting information (if required)
  - Supporting information attachments (if provided by presenters)



### Ensure all preparation activities are complete

- Verify all key participants / stakeholders will attend (cancel or reschedule if necessary)
- Ensure meeting logistics are completed (e.g., updated notice and supporting information distributed)
- Prepare yourself (e.g. handouts and presentation files are available)

Based on information from:

The Harvard Manage Mentor: Running a Meeting ([http://leadershipcenter.web.boeing.com/harvard\\_managementor/running/steps/index.htm](http://leadershipcenter.web.boeing.com/harvard_managementor/running/steps/index.htm))

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Antony, Jay. *How to run a meeting*. Harvard Business Review, pp 43 – 57, March-April 1976.

# Checklist: Planning an Effective Virtual Meeting

ROLES: Owner and/or Coordinator

PHASE: Before

Agenda Development Activities	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Follow the “Planning an Effective Meeting” checklist</b></li><li><input type="checkbox"/> <b>Virtual Meetings should be no longer than 90 minutes</b> If they must be longer, add breaks into the agenda Consider a series of shorter focused meetings</li><li><input type="checkbox"/> <b>Share the “Participating in an Effective Virtual Meeting” checklist with all attendees prior to the meeting</b></li></ul>
Logistical Activities (Owner may delegate some activities to coordinator)	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Consider Time Zones</b></li><li><input type="checkbox"/> <b>International participants</b> Calling in from outside the U.S., special calling rules apply Know participants for export compliance rules</li><li><input type="checkbox"/> <b>Determine technology requirements</b> Lync – 1 to 3 people Webex/Teleconference – 3+ people Webinar – virtual training or organization all team meetings</li><li><input type="checkbox"/> <b>Knowledge and use of technology tools</b> Know how to use the technology tools Practice in advance to ensure confident navigation (e.g., voting/polling, teleconference options) Technology method works for the purpose intended (e.g., streaming video) Share application rather than desktop</li><li><input type="checkbox"/> <b>Prepare contingency plans should technology fail</b> Have the information located in various locations (e.g., save files to a USB drive, hard drive or send yourself an email with server links/files) Reschedule if the technology is getting in the way of an effective meeting</li></ul>

# Checklist: Running an Effective Meeting

ROLES: Owner and/or Presenter

PHASE: During

Starting the Meeting (Owner)	<div data-bbox="151 212 207 268"><input type="checkbox"/></div> <b>Start the meeting on time</b> For virtual meetings refer to “Running an Effective Virtual Meeting” checklist Demonstrate respect for the participant’s time by ensuring meeting is started on time Note: If meeting owner/facilitator are not available to begin the meeting be sure a delegate has been assigned Set the meeting tone – sense of urgency, safe environment for open dialogue and level of cooperation <div data-bbox="151 384 207 441"><input type="checkbox"/></div> <b>Set the stage, but keep it short</b> Review the meeting purpose and objective(s) Review the agenda: <ul style="list-style-type: none"> <li>- Highlight the agenda items</li> <li>- Introduce/identify the presenter associated with each agenda item</li> <li>- Remind the participants of the discussion type and/or desired outcome for each agenda item</li> </ul> Review the administrative information and/or meeting ground rules: <ul style="list-style-type: none"> <li>- Evacuation information, cell phone protocol, etc.</li> <li>- Assign roles (e.g., meeting minutes recorder, timekeeper)</li> </ul>
Conducting the Meeting (Owner and/or Presenter)	<div data-bbox="151 709 207 766"><input type="checkbox"/></div> <b>Structure the discussion and stay on target</b> Practice active listening Keep focused on meeting purpose and objective(s) Identify if ‘desired outcome’ was reached at conclusion of each agenda item discussion Restrict your interventions; encourage openness and active participation Draw out the ‘quiet’ or ‘silent’; moderate the ‘talkative’ Encourage shared dialogue; document issues requiring further attention at a follow-on meeting in parking lot <div data-bbox="151 961 207 1018"><input type="checkbox"/></div> <b>Document agreements and action items</b> Do not rely on ‘mental notes’; document agreements or action items as they are made Assign action items to facilitate follow-through <div data-bbox="151 1077 207 1134"><input type="checkbox"/></div> <b>Ensure mutual understanding—not necessarily mutual adoration</b> Goal is to ensure a common understanding of the problem, topic or issue and why it is being discussed Avoid being the ‘greatest barrier to success’ <div data-bbox="151 1213 207 1270"><input type="checkbox"/></div> <b>Monitor the clock</b> Ensure agenda item discussions are within the allocated time Make adjustments, table discussions or initiate a follow-on meeting if more time is required to conclude the agenda item discussion
Ending the Meeting (Owner)	<div data-bbox="151 1381 207 1438"><input type="checkbox"/></div> <b>Strive to close on a ‘note of achievement’</b> Briefly review and/or summarize agreements and action items Identify if the objective(s) was satisfied Complete a ‘process check’ with the attendees (e.g., solicit feedback on meeting mechanics, provide an open forum to facilitate raising new issues or concerns) <div data-bbox="151 1549 207 1606"><input type="checkbox"/></div> <b>Document the next steps</b> Review any required follow-up tasks or meeting requirements Assign follow-up tasks to ensure completion and accountability Set date, time and/or place for any required follow-up meetings Identify date/time and method for distributing meeting minutes <div data-bbox="151 1738 207 1795"><input type="checkbox"/></div> <b>End the meeting on time</b> Demonstrate respect for the participant’s time by ensuring meeting ends on time If more time is necessary: <ul style="list-style-type: none"> <li>- Set date/time for follow-up meeting, or</li> <li>- Extend meeting time with participant’s consent</li> </ul>

Based on information from:

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# Checklist: Running an Effective Virtual Meeting

ROLES: Owner and/or Presenter

PHASE: During

## Starting the Meeting (Owner)

- ☐ **Follow the “Running an Effective Meeting” checklist**
- ☐ **Prepare for meeting**
  - Prepare and print or open participant roster for taking meeting attendance
  - Close any unnecessary files, especially proprietary information
  - Open all meeting related files (e.g., agenda, presentations)
  - Start Webex 5 to 7 minutes before the meeting and sign in using full name; use wireless internet connection if room is not available to begin set-up
  - Remove distractions (e.g., Place a sign indicating in a virtual meeting, Silence a cell phone)
- ☐ **Knowledge and use of technology tools**
  - Know how to use the technology tools by practicing in advance to ensure confident navigation (e.g., voting polling, teleconference options)
  - Know how to mute phone
  - Technology method works for the purpose intended (e.g., streaming video)
  - Share application rather than desktop

## Conducting the Meeting (Owner and/or Presenter)

- ☐ **Utilize participant roster**
  - To conduct introductions
  - To avoid multiple people speaking at once
  - Have participants state first and last name, title and organization
  - Make sure to include everyone, both on the phone and in the room
  - Stop to introduce late comers; announce when people enter and leave the meeting
- ☐ **Review meeting groundrules**
- ☐ **Minimize noise and distractions**
  - Mute via individual phone or teleconference options
  - Caution teleconference participants about placing call on hold due to music, etc.
  - Avoid excessive scrolling, sudden rapid cursor movements or jumping too quickly between pages; it can be disorienting for participants
  - Note: Freeze mode applies only to the projector, not to Webex participants
- ☐ **Engage meeting participants**
  - Request participants state name prior to making statements, etc.
  - Pay attention to who is or isn't participating (use roster), ask questions of participants by name
  - Do not multi-task - virtual meetings require more concentration
  - No more than 3 slides or 10 minutes before interacting
  - In-room
    - No side conversations
    - Speak in close proximity to the speakerphone/microphone
    - Explain things that happen in the room to those online

## Ending the Meeting (Owner)

- ☐ **Turn off sharing**
- ☐ **Shut down technology tools**
- ☐ **End the telephone call**



# Checklist: Participating in an Effective Meeting

ROLES: Participant

PHASE: Before, During and After

Before the Meeting	<div data-bbox="162 199 219 262"><input type="checkbox"/></div> <div data-bbox="243 210 649 252"><b>Review the meeting logistics</b></div> <div data-bbox="267 252 1412 315"> <p>Know the basics: when, where and how long If there are any virtual participants, refer to "Participating in an Effective Virtual Meeting" checklist</p> </div> <div data-bbox="162 325 219 388"><input type="checkbox"/></div> <div data-bbox="243 336 544 378"><b>Understand your role</b></div> <div data-bbox="267 378 1412 567"> <p>Review the meeting purpose and objective(s) Review the agenda and agenda item details - Is it clear why your participation is needed? Consider: Talking to the owner or facilitator to get clarification of the need and/or expectations Talking with your manager and identify alternative attendees or options Talking with owner/facilitator to negotiate alternatives</p> </div> <div data-bbox="162 577 219 640"><input type="checkbox"/></div> <div data-bbox="243 588 479 630"><b>Prepare yourself</b></div> <div data-bbox="267 630 1364 693"> <p>Complete all identified 'preparation actions' Document your questions or concerns so you will have them for reference during the meeting</p> </div>
During the Meeting	<div data-bbox="162 724 219 787"><input type="checkbox"/></div> <div data-bbox="243 735 397 777"><b>Be on time</b></div> <div data-bbox="267 777 812 808"> <p>Arrive on time and prepared for the discussion</p> </div> <div data-bbox="162 808 219 871"><input type="checkbox"/></div> <div data-bbox="243 819 1023 861"><b>Actively participate in the discussion and stay on target</b></div> <div data-bbox="267 861 1559 1207"> <p>Practice active listening Keep focused on meeting purpose and objective(s); keep in mind the 'desired outcome' for each agenda item Be conscious of your 'meeting style' (e.g., if you are an extravert be conscious of how often you provide input, if you are an introvert be conscious of your silence and take the initiative to speak up) Acknowledge and manage conflict constructively: - Be transparent regarding your intent - Ask others to restate what they are hearing; translate or reflect what you are hearing - Acknowledge other's positions; dependant on the situation either refocus the discussion back to the meeting objective or state the intent/need for resolving the issue; consider moving issue to a parking lot NOTE: Conflict management may be best handled by the meeting owner or facilitator, but it is better to resolve the conflict awkwardly 'than let a potentially damaging conflict go unchecked'</p> </div> <div data-bbox="162 1228 219 1291"><input type="checkbox"/></div> <div data-bbox="243 1239 633 1281"><b>End the meeting with intent</b></div> <div data-bbox="267 1281 1453 1344"> <p>Record the agreements and action items that are applicable to you or the organization you represent Verify the follow-up tasks and commitments you're accountable for</p> </div>
After the Meeting	<div data-bbox="162 1365 219 1428"><input type="checkbox"/></div> <div data-bbox="243 1375 552 1417"><b>Review meeting notes</b></div> <div data-bbox="267 1417 974 1522"> <p>Review distributed meeting notes to ensure: - Understanding of documented agreements - Clarification of assigned follow-up tasks or action items</p> </div> <div data-bbox="162 1522 219 1585"><input type="checkbox"/></div> <div data-bbox="243 1533 673 1575"><b>Follow-up on assigned actions</b></div> <div data-bbox="267 1575 1461 1638"> <p>Communicate completion or ask for help (if needed) of assigned follow-up tasks or action items to the appropriate key participants or meeting stakeholders</p> </div> <div data-bbox="162 1648 219 1711"><input type="checkbox"/></div> <div data-bbox="243 1659 527 1701"><b>Individual reflection</b></div> <div data-bbox="267 1701 1559 1890"> <p>Evaluate your future participation role, especially if the meeting is recurring - Are you the 'right' participant in terms of needed skills, expertise or experience? Consider talking with the meeting owner and/or your manager regarding the participation needs (e.g., is there value in continued participation and/or mismatch between identified/actual role requirements?) Support decisions made in the meeting; do not act with passive aggressive behavior (e.g., leaving meeting supporting decision but verbally opposing decision around the water cooler)</p> </div>

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# Checklist: Participating in an Effective Virtual Meeting

ROLES: Participant

PHASE: Before, During and After

Before the Meeting



**Follow “Participating in an Effective Meeting” checklist**



**Knowledge and use of technology tools**

International participants calling in from outside the U.S., special calling rules apply  
Know how to use the technology tools by practicing in advance to ensure confident navigation (e.g., voting polling, teleconference options)  
Sign-in to Webex properly with full name 5 to 7 minutes before the meeting  
Remove distractions (e.g., Place a sign indicating in a virtual meeting, Silence a cell phone)  
Know how to mute phone

During the Meeting



**Consideration of others**

Avoid multiple people speaking at once  
State first and last name, title and organization during introductions  
Announce when leaving the meeting  
Minimize noise and distractions  
- Mute via individual phone or teleconference options  
- Do not place teleconference on hold, use mute  
State name prior to making statements, etc.  
Speak in close proximity to the speakerphone/microphone  
No side conversations  
For those in the room, explain what happens in the room to those on-line



**Stay focused**

Do not multi-task – virtual meetings require more concentration

# Checklist: Presenting in an Effective Meeting

ROLES: Presenter

PHASE: Before, During and After

Before the Meeting	<div data-bbox="162 199 219 252"><input type="checkbox"/></div> <div data-bbox="243 210 1388 304"> <b>Review the meeting logistics</b>            Know the basics: when, where and how long            If there are any virtual participants, refer to “Presenting in an Effective Virtual Meeting” checklist         </div> <div data-bbox="162 304 219 357"><input type="checkbox"/></div> <div data-bbox="243 325 1502 640"> <b>Understand your role</b>            Review the meeting purpose and objective(s)            Review the preliminary meeting agenda, specifically the items listing you as the presenter            - Is it clear why you have been identified as the presenter?            IF NOT: Talk to the owner or facilitator to get clarification; consider proposing an alternative presenter            IF YES: Submit feedback to the owner or facilitator regarding:            - What supporting information you will distribute to the participants in advance of the meeting?            - What preparation actions should participants complete prior to the meeting?            - How much time should be allocated to the agenda item to reach a satisfactory conclusion?            - What equipment is needed in the meeting room (e.g., projector, computer, whiteboard)?         </div> <div data-bbox="162 640 219 693"><input type="checkbox"/></div> <div data-bbox="243 651 1461 850"> <b>Prepare yourself</b>            Prepare all presentation or supporting information materials; be sure to do a quality spot check            Distribute materials to participants (as necessary)            Submit materials to the owner/facilitator as necessary for use during the meeting; have backup media available (e.g., copies on a flash drive)            Think about success factors and possible roadblocks that may be brought up during the meeting         </div>
During the Meeting	<div data-bbox="162 882 219 934"><input type="checkbox"/></div> <div data-bbox="243 892 1331 955"> <b>Be early</b>            Arrive early and prepared for the discussion; ensure your presentation material is available         </div> <div data-bbox="162 997 219 1050"><input type="checkbox"/></div> <div data-bbox="243 1008 1404 1228"> <b>Encourage and facilitate active participation during your presentation or discussion</b>            Monitor the clock to ensure agenda item is covered in the allocated time            Practice active listening; restrict your interventions; encourage openness and active participation            Keep focused on meeting purpose/objective(s) and how your agenda item supports            Keep in mind the discussion type and ‘desired outcome’ for your agenda item(s)            Draw out the ‘quiet’ or ‘silent’; moderate the ‘talkative’            Encourage shared dialogue         </div> <div data-bbox="162 1249 219 1302"><input type="checkbox"/></div> <div data-bbox="243 1260 1015 1354"> <b>End your presentation or discussion with intent</b>            Ensure agreements and/or action items are accurately recorded            Verify action items are assigned         </div>
After the Meeting	<div data-bbox="162 1428 219 1480"><input type="checkbox"/></div> <div data-bbox="243 1438 1559 1596"> <b>Submit and/or review meeting notes</b>            Submit and/or review meeting notes specific to your action item to ensure:            - Understanding of documented agreements            - Clarification of assigned action items (especially if agenda item must be carried-over to a follow-on meeting)            Provide copies of presentation material for distribution to participants (as necessary)         </div> <div data-bbox="162 1606 219 1659"><input type="checkbox"/></div> <div data-bbox="243 1617 1534 1711"> <b>Follow-up on assigned actions</b>            Communication completion of assigned follow-up tasks or action items to the appropriate key participants or meeting stakeholders         </div> <div data-bbox="162 1722 219 1774"><input type="checkbox"/></div> <div data-bbox="243 1732 1518 1900"> <b>Individual reflection</b>            Did your presentation/discussion meet the intended need?            Were you able to reach the ‘desired outcome’?            How were the meeting mechanics (e.g., did you stay with your allocated time, were there technical issues)?            Overall, how can you do better the next time you are asked to be a presenter?         </div>

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# Checklist: Presenting in an Effective Virtual Meeting

ROLES: Presenter

PHASE: Before, During and After

Before the Meeting

☐

**Follow the “Presenting in an Effective Meeting” checklist**

☐

**Prepare for meeting**

Close any unnecessary files, especially proprietary information

Open all meeting related files (e.g., agenda, presentations)

Start Webex 5 to 7 minutes before the meeting and sign in using full name

Remove distractions (e.g., Place a sign indicating in a virtual meeting, Silence a cell phone)

☐

**Knowledge and use of technology tools**

Know how to use the technology tools by practicing in advance to ensure confident navigation (e.g., voting polling, teleconference options)

Know how to mute phone

Technology method works for the purpose intended (e.g., streaming video)

Share application rather than desktop

During the Meeting

☐

**Minimize noise and distractions**

Mute via teleconference options, if needed

☐

**When running technology during presentation**

Avoid excessive scrolling, sudden rapid cursor movements or jumping too quickly between pages; it can be disorienting for participants

Freeze mode applies only to the projector, not to Webex participants

☐

**Engage meeting participants**

No more than 3 slides or 10 minutes before interacting

Speak in close proximity to the speakerphone/microphone

Explain things that happen in the room to those online

# Checklist: Meeting Follow-Up

ROLES: Owner and/or Coordinator

PHASE: After



## Document and distribute meeting notes

- Review agenda items identifying whether each item was discussed and desired outcomes reached
  - If some items were not resolved, determine the required next step (e.g., move item to a follow-on meeting agenda)
- Review and/or transcribe notes taken during meeting (e.g., notes taken by the designated 'note taker')
  - If necessary, send out draft of transcribed notes to presenters or discussion leaders for review and feedback
- Be sure notes highlight agreements and/or assigned follow-task/action items
- Distribute final copy of meeting notes by the date/time and distribution method agreed to at close of meeting



## Follow-up on assigned actions

- Communicate completion of assigned follow-up tasks or action items to the appropriate key participants or meeting stakeholders



## Schedule any required follow-up meetings

- Initiate actions to schedule and plan any follow-up meetings agreed to at the close of the meeting
- Flag any notes/agenda items that need to carry-over to a follow-on agenda (e.g., parking lot items)



## Individual reflection

- Evaluate the effectiveness of the meeting
  - Consider some of the following questions:
    - Did the outcome satisfy the intended purpose and/or objectives?
    - Were all the right participants included?
    - Where their any gaps that could have been anticipated?
    - Was the right level of supporting information distributed prior to the meeting?
    - Did participants come prepared for the meeting?
  - Consider the meeting mechanics:
    - Was the meeting started and ended on time?
    - Was the agenda followed (items covered as scheduled in the allocated time)?
    - Were all presenters and key participants in attendance?
    - Did the meeting room have all needed equipment and was it the right size?
  - Consider soliciting feedback from presenters/discussion leaders and/or key participants
- Overall, identify what actions you can take to make your next meeting better

*Note: Some of the follow-up activities may be delegated to the coordinator (e.g., transcription or distribution of notes)*

# Meeting Notes

Use this form to keep track of the issues discussed, agreements made and assigned follow-up tasks/action items

Meeting Topic:		Date:
Meeting Owner:	Note Taker:	
Participants (record only those who attended the meeting):		

Agenda Item #___ :	
Discussion Points, Concerns or Issues	Agreements
Agenda Item #___ :	
Discussion Points, Concerns or Issues	Agreements
Agenda Item #___ :	
Discussion Points, Concerns or Issues	Agreements
Agenda Item #___ :	
Discussion Points, Concerns or Issues	Agreements

Action Items (A) or Parking Lot Items (P)			Assigned To	Due Date
#	P or A	Item		

<b>Meeting Topic:</b>		<b>Date and Time:</b>		
<b>Meeting Location:</b>		<b>Scheduled Duration:</b>		
<b>Required Participants:</b>		<b>Audio Conference Information:</b> Phone Number: Passcode: Host Code: <b>WebEx Information:</b> Meeting Number: Password: Host Key:		
<b>Meeting Purpose</b> (For recurring meetings the purpose applies to the entire meeting set):		<b>Meeting Type (check all that apply)</b> Decisional (D) Info Sharing (I) Problem Solving (P) Governing (G) Other (O): <i>Does this meeting support or align with a business goal or objective?</i> Yes    No		
<b>Meeting Objective</b> (For recurring meetings objective(s) are specific to this single occurrence):				
<b>AGENDA ITEMS</b>				
<b>#</b>	<b>Item</b>	<b>Presenter</b>	<b>Allocated Time</b>	<b>Type</b>
				D I P G O
				D I P G O
				D I P G O
				D I P G O
				D I P G O
				D I P G O
				D I P G O
				D I P G O



<b>Meeting Topic:</b>		<b>Date and Time:</b>	
<b>Meeting Location:</b>		<b>Scheduled Duration:</b>	
<b>Required Participants:</b>		<b>Audio Conference Information:</b> Phone Number: Passcode:                      Host Code: <b>WebEx Information:</b> Meeting Number: Password:                      Host Key:	
<b>Meeting Purpose</b> (For recurring meetings the purpose applies to the entire meeting set):		<b>Meeting Type (check all that apply)</b>  Decisional                      Problem Solving Info Sharing                      Governing Other: <i>Does this meeting support or align with a business goal or objective?</i> Yes      No	
<b>Meeting Objective</b> (For recurring meetings objective(s) are specific to this single occurrence):			
<b>Agenda Item #___ :</b>			
<b>Presenter/Discussion Leader:</b>		<b>Allocated Time:</b>	
<b>Supporting Info to be Provided by Presenter/Leader:</b>		<b>Requested Participant Preparation Actions:</b>	
<b>Desired Outcome at End of Meeting</b>		<b>Type of Discussion</b> Decisional                      Problem Solving                      Other: Info Sharing                      Governing	
<b>Agenda Item #___ :</b>			
<b>Presenter/Discussion Leader:</b>		<b>Allocated Time:</b>	
<b>Supporting Info to be Provided by Presenter/Leader:</b>		<b>Requested Participant Preparation Actions:</b>	
<b>Desired Outcome at End of Meeting</b>		<b>Type of Discussion</b> Decisional                      Problem Solving                      Other: Info Sharing                      Governing	
<b>Agenda Item #___ :</b>			
<b>Presenter/Discussion Leader:</b>		<b>Allocated Time:</b>	
<b>Supporting Info to be Provided by Presenter/Leader:</b>		<b>Requested Participant Preparation Actions:</b>	
<b>Desired Outcome at End of Meeting</b>		<b>Type of Discussion</b> Decisional                      Problem Solving                      Other: Info Sharing                      Governing	
<b>Agenda Item #___ :</b>			
<b>Presenter/Discussion Leader:</b>		<b>Allocated Time:</b>	
<b>Supporting Info to be Provided by Presenter/Leader:</b>		<b>Requested Participant Preparation Actions:</b>	
<b>Desired Outcome at End of Meeting</b>		<b>Type of Discussion</b> Decisional                      Problem Solving                      Other: Info Sharing                      Governing	

Based on information from:

The Harvard Manage Mentor: Running a Meeting ([http://leadershipcenter.web.boeing.com/harvard\\_managementor/running/steps/index.htm](http://leadershipcenter.web.boeing.com/harvard_managementor/running/steps/index.htm))

Meeting Planning: Writing the Script (<http://www.effectivemeetings.com/meetingplanning/agenda/script.asp>)