



Team Meeting Agenda Template

Description

Use this template to successfully achieve the goals of a Co-Active meeting:

1. Complete all necessary tasks, decisions, etc.
2. Get the best contribution from all attendees.
3. Leave people motivated and committed to follow through on their responsibilities.
4. Have clear accountability.

Instructions

1. Apply the meeting effectiveness checklist (below) to ensure that the basics of good meeting management are covered. You may want to add to the list based on your experience or the meeting norms in your organization.
2. Design the meeting agenda using the template. The specific design will vary according to the purpose of the meeting.
3. Try the suggested techniques in the *Co-Active Skills for Teams* section to keep the meeting on track and productive.
4. Conduct in-the-moment training on skills and tools like listening, powerful questions, roadmap, Saboteur, etc. This will encourage everyone's responsibility for the meeting's success and lighten your load.



Team Meeting Template

Design the Meeting

1. Define the purpose of the meeting. Is it primarily problem solving, information gathering, information dissemination, planning, assessment, decision making, idea generation, etc.? There will always be a mix but narrowing to what is truly needed to get the most benefit will help.
2. Outline the meeting agenda and estimate the amount of time for each segment. In broad terms, every agenda will include:
 - a. Agenda review and revision
 - b. Working session
 - c. Summary and accountability review
 - d. Meeting process review
3. Identify attendees. Ideally, those attending can all contribute and have a vested interest in the outcome.
4. Invite the attendees. Communicate the purpose of the meeting, what you need them to contribute, and what preparation you expect of them.

Conduct the Meeting

Apply the Effective Meeting Checklist, Effective Meeting Etiquette Checklist and Co-Active skills.

Follow-up

1. Distribute notes
2. Review meeting assessment
3. Track accountabilities

Effective Meeting Checklist	
<input type="checkbox"/>	Roles assigned: Meeting leader, scribe, time keeper, facilitator (if needed)
<input type="checkbox"/>	Norms/agreement list posted or otherwise available
<input type="checkbox"/>	Agenda with estimated times available
<input type="checkbox"/>	Action items clear (who, what, deadline)
<input type="checkbox"/>	Next meeting scheduled

Effective Meeting Etiquette Checklist	
<input type="checkbox"/>	Be brief and to the point
<input type="checkbox"/>	Listen with curiosity in order to understand
<input type="checkbox"/>	No side conversations
<input type="checkbox"/>	Speak your concerns in the meeting (rather than hallway)
<input type="checkbox"/>	Respect divergent perspectives
<input type="checkbox"/>	Take responsibility for the team's success, regardless of your role