

A Guide to Effective Meetings

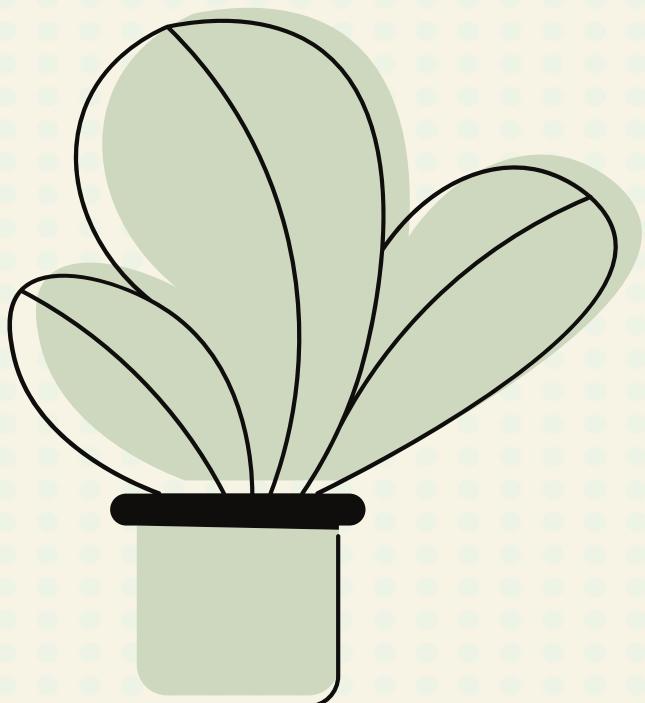
WRITTEN BY
ROOTED STRATEGY



Ready for more meaningful meetings?

We've got some tips for effective meetings, whether you are the meeting facilitator, convenor, or attendee.

Your time is valuable and the time of your colleagues is valuable. Make the most of your time together by implementing the tips in this toolkit.



Tips for Meetings

01 DO WE REALLY NEED TO MEET?

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Before scheduling a meeting, determine the WHY, WHAT and the HOW.

IF YOU ARE A MEETING ATTENDEE...

Be curious about the meeting purpose and process, and how you can contribute.

Meetings have become a default in the workplace and on teams. If you're considering scheduling a meeting, start by clearly defining the purpose of your meeting by asking "WHY is it important that we have this meeting"? Then determine your goals for the meeting by asking "WHAT do we hope to achieve in this meeting?" Your goals for the meeting should align with your purpose.

It is important to match the purpose of your meeting to the method of achieving it. HOW we meet and communicate matters. Consider whether an email exchange would meet the goal of the meeting, or a quick phone call. Other options include group polls or surveys. Everyone's time is limited and extremely valuable. If you're scheduling a meeting, make sure it's something worth asking people to spend their time on.

Tips for Meetings

02 WHO NEEDS TO BE THERE?

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Consider who NEEDS to be there and whose attendance is optional.

IF YOU ARE A MEETING ATTENDEE...

Consider whether or not you need to attend the meeting and the value you add by being there.

Consider who really needs to set aside the time for this meeting. Think about necessary participants and optional participants. There's a bonus benefit to this: narrowing down the number of necessary participants usually makes scheduling much more of a breeze. You can still invite those whose attendance is optional if you feel they could contribute to the conversation, but don't delay a meeting to schedule around them.

A few questions to ask as you consider who is necessary for your meeting:

Who are the key stakeholders directly impacted by the meeting's outcomes?
Include individuals or groups with a vested interest.

Are there subject matter experts or individuals with unique knowledge relevant to the topic? Ensure expertise is represented when needed.

Who has decision-making authority or essential input for decisions? Include those with decision-making power or critical insights.

Can some participants be updated afterward or through alternative means?
Consider whether they can receive information outside of the meeting.

Tips for Meetings

03 SHARE THE PURPOSE

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Share the purpose of the meeting ahead of time and articulate the purpose at the front-end of the meeting.

IF YOU ARE A MEETING ATTENDEE...

Ask what the purpose of the meeting is, if it isn't shared with the meeting invitation. Hint: a meeting title is not a purpose.

There is no way to measure whether or not the meeting was successful or a productive use of time if there isn't consensus on why you're gathering in the first place. As a facilitator, it is important to articulate early in the meeting what the purpose is so everyone is in alignment on why they are there. It should never be assumed that everyone is entering the space (physically or virtually) with the same things in mind. The purpose should also be revisited at the end of the meeting by asking: Did we achieve our purpose? Do we need to schedule another meeting? (If yes, start again at tip 1!)

Tips for Meetings

04 PREPARE AHEAD OF TIME

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Send pre-work ahead of the meeting and explain the value it adds and how much time it should take.

IF YOU ARE A MEETING ATTENDEE...

Ask how you should prepare for the meeting.

Let the group know what they need to prepare for the meeting. For example, if the purpose of the meeting is reviewing a contract, send the contract out ahead of time asking everyone to review and prepare questions. If you're entering a strategic planning session, send the agenda ahead of time and have key questions to consider so people have mentally prepared to enter into the planning space. In sending pre-work, be sure to make note of how much time the attendee should set aside to complete it. This mitigates attendees pulling up the pre-work 15 minutes prior to the meeting.

If you're attending a meeting and have not received any information on how to prepare, ask if there's anything that would be helpful for you to know before attending the meeting.

Tips for Meetings

05

DETERMINE WHO IS LEADING

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Know your role as the facilitator and what you need to do to keep the meeting on track

IF YOU ARE A MEETING ATTENDEE...

Ask who is leading the meeting so you have a point of contact for any questions as you prepare for the meeting.

Every meeting should have a facilitator, someone who leads the meeting and guides the group through the agenda. This person is typically identified before the meeting so attendees have a point of contact for questions related to pre-work or meeting logistics.

A few key things to consider if you're facilitating the meeting. First, actively manage the discussion to ensure that one person does not dominate the conversation. Encourage quieter participants to share their views and provide opportunities for everyone to contribute. Additionally, keep the meeting on track by adhering to the agenda and time limits for each agenda item. Politely but firmly redirect the discussion if it starts to veer off-topic. Adapt the agenda in real time if more space is needed for discussion.

Meeting Roles

Everyone (not just the facilitator) has a role to play in an effective meeting. These important jobs help keep the meeting on track!



The Time Keeper keeps an eye on the clock to ensure the group doesn't spend too much time on one agenda item. The time keeper should keep the facilitator informed on when time frames for agenda items are coming to a close so the facilitator can decide how to best proceed with the meeting.



The Note-Taker ensures that important information, insights and decisions are captured throughout the meeting and is able to help the facilitator recap at the end of the meeting what decisions have been made and who is responsible.



Technological Support is important for in-person and virtual gatherings. Technology can quickly derail a meeting. Make sure to test equipment ahead of time and have someone present who is familiar with the technology being used to conduct the meeting.

Tips for Meetings

06 SPACIOUS AGENDA

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

Create a spacious agenda and be realistic about what the group can accomplish.

IF YOU ARE A MEETING ATTENDEE...

Review the agenda before the meeting so you can be on the same page with other attendees. In the meeting, speak out if you feel like something is being rushed and needs more time for dialogue or decision making.

One of the biggest meeting failures is trying to cram too much into the agenda. Be realistic about what you can achieve in the allotted time. If a decision is being made, leave at least 30 - 45 minutes for discussion. Don't assume that everyone is on the same page. Rushing decisions leads to lack of commitment and accountability. Take the time that's needed. Worst case scenario: schedule a follow up meeting. Don't rush through it, and stay focused on the purpose.

Tips for Meetings

07

ALIGN ON DECISIONS & ACTIONS

IF YOU ARE A MEETING FACILITATOR OR CONVENOR...

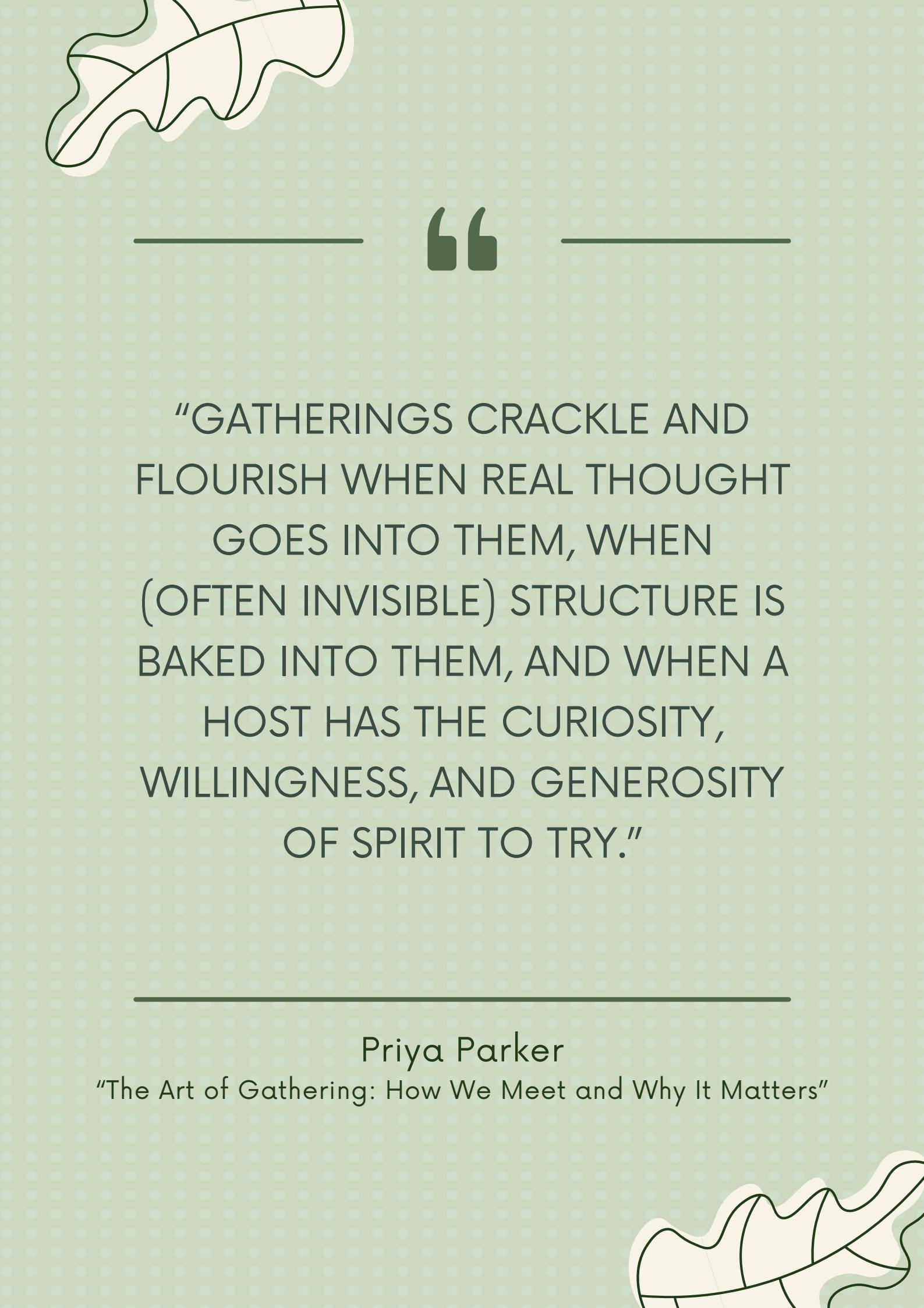
Conclude meetings by asking "what exactly have we decided here today?"

IF YOU ARE A MEETING ATTENDEE...

1) Get clear on what decisions have been made and what you are responsible for before the next meeting or deadline.

2) Make sure other members of your team who may not be present are aware of any decision that has been made.

When in doubt, write it out! Even when you THINK you know, write it out! It is easy to walk away from a meeting with different understandings on specific tasks, and timelines, and clarity on who is responsible for getting things done. It is helpful to identify a note-taker for every meeting to document action items, person(s) responsible, support needed and deadlines. This develops a shared understanding of who is responsible for the work and how others can support it.



“GATHERINGS CRACKLE AND FLOURISH WHEN REAL THOUGHT GOES INTO THEM, WHEN (OFTEN INVISIBLE) STRUCTURE IS BAKED INTO THEM, AND WHEN A HOST HAS THE CURIOSITY, WILLINGNESS, AND GENEROSITY OF SPIRIT TO TRY.”

Priya Parker

“The Art of Gathering: How We Meet and Why It Matters”

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