

# Meeting Management Guidelines

Use this tool as a quick reminder for how to plan and lead an effective meeting to ensure that it meets your objective and is a valuable use of time for everyone involved.

PREPARE	CONDUCT	FOLLOW UP
<ul style="list-style-type: none"> <li>▪ Be clear about the purpose of the meeting</li> <li>▪ Identify desired outcomes. When the meeting is over, what will be completed?</li> <li>▪ Utilize virtual meeting technology to engage virtual participants</li> <li>▪ Create an agenda that will achieve the desired outcomes with each agreement or item that needs action - who will take the lead on it, and how long they will have</li> <li>▪ Send desired outcomes and meeting agenda to meeting participants prior to the meeting</li> <li>▪ If there are employees who will be participating virtually, arrange for teleconference number, send any handouts prior to the meeting, and consider using virtual meeting technology.</li> <li>▪ Be clear about who will make decisions. Consensus? Vote? Leader decides?</li> <li>▪ Determine roles – facilitator, note taker/documenter</li> </ul>	<ul style="list-style-type: none"> <li>▪ Establish ground rules for members to follow during the meeting</li> <li>▪ Confirm purpose, desired outcomes, agenda, decision-making method, roles, and ground rules at the start of the meeting</li> <li>▪ Ensure that team leader and members practice facilitative behaviors like active listening, reserving judgment, respecting others views and asking open-ended questions. Be sure to include virtual team members in discussion and seek their input</li> <li>▪ Make agreements by asking if there is anyone who cannot support it</li> <li>▪ Identify action items, including what the action is, who has responsibility, and when it will be completed</li> <li>▪ Confirm agreements and action items</li> <li>▪ Evaluate the meeting. What improved?</li> <li>▪ Make sure meetings you chair start and finish on time, allowing people to plan the rest of their day effectively</li> </ul>	<ul style="list-style-type: none"> <li>▪ Respond to the meeting evaluation and feedback if necessary</li> <li>▪ Distribute documentation, including minutes and agreed upon action items with the responsible individual and due date</li> <li>▪ Consider if meeting minutes are required for every meeting, perhaps just action items are more appropriate</li> </ul>

