# Successful Meetings Cheatsheet

Eighty percent of success is showing up—that's according to film director Woody Allen. But successful meetings require much more than just showing up. Successful meetings are planned and run—that is, managed or conducted. Are you running your meetings? Is a member of your team? Or are you all just showing up? Read these tips for strategies on planning and running effective meetings.

## Before You Meet

- Schedule them for the same date and time every week. Only deviate if you have to and reschedule it right away.
- If there's nothing to cover in the meeting, cancel it.
- Set meeting duration for 30 minutes and no more to start. If you schedule for longer the meeting will certainly fill the available time and if you need more, you can always schedule more time for next week.
- Reasons to meet: generate creative solutions, analyze problems, make decisions
- Reasons not to meet: status updates, give information (unless it is emotionally sensitive), plan a schedule, review recommendations
- Alternatives to meeting: email, telephone, digital document, updates in your project/task management system
- Have an agenda no matter what. Agenda determines the form and structure of a meeting.
- Delegate the creation of the agenda to a member of your team
- Distribute agenda and any supporting documentation to all attendees at least 24 hours before the meeting.
- Make sure you come to the meeting prepared (you set the example for your team)

## Recipe for Creating an Effective Agenda

### Step One: Overall Goal

The overall finish line; where the team is heading; the final result

### Step Two: Meeting Objectives

What the meeting will accomplish, directly related to reaching the overall goal. Each objective is a SMART goal and starts with a verb (Examples: Determine, Develop, Decide)

### Step Three: Non-Objectives

What will not be accomplished in the meeting; what could pull a meeting off track. NON stands for Not-Attainable, Off-base, and Non-Specific. Example:  We are not going to create a XYZ Product launch schedule

### Step Four: Critical Information

The information needed in the meeting to achieve the meeting objectives

### Step Five: Topics

The discussion activities that help you achieve your meeting objectives

### Step Six: Key Players

The people who must attend for the meeting to be successful Consider Skills, Resources, Authority, and Buy-in


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## During the Meeting

- Summarize before moving on to a new meeting topic.
- Summarize agreements and action steps before participants leave the meeting.
- Record the decisions, action items, and other important points that come from the discussion
- Delegate note taking to a member of your team
- Begin and end on time
- Manage the structure—not the content
- Encourage everyone's participation
- Encourage generative thinking by recording all ideas
- Table extraneous ideas for later discussion (parking lot)

## Following Up

- Set a clear follow-up procedure during the meeting
- Assign the distribution of notes to someone on your team
- Distribute minutes with action items promptly and see that all meeting attendees get them, review them, and agree with them.

## Quick-and-Dirty Meeting Strategies

What happens when you need to hop on a call or duck into a conference room to make some quick decisions with others? Beware! These kinds of quick-and-dirty meetings can be real time gobblers. Here are some suggestions to keep them on track.

**Rule 1:** Start by agreeing on how much time you've got.
**Rule 2:** Agree on your quick-and-dirty objective.
**Rule 3:** Agree on a quick-and-dirty process (for example: we'll hear everyone's thoughts, then vote).
**Rule 4:** As a general rule, use half your time for open discussion and half your time for decision making.
**Rule 5:** State your opinions briefly and concisely; avoid monopolizing the discussion.
**Rule 6:** Write down and table tangential topics or concerns.
**Rule 7:** Agree on a follow-up plan, including when you'll address tabled issues.


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