Effective Meetings: Create Your Own Checklist

Below are a few tips, warnings, and recommendations, all culled from research on the preparation and reflection for effective meetings. Which ones work for you? Which will you put on your checklist for your next meeting?

Before the Meeting

- Ask yourself, "What is this meeting intended to achieve?" Make sure everyone knows the answer to that question when you invite them to attend. If you can't answer it, don't hold the meeting. Similarly, if you're invited to a meeting and no one can tell you what it's for, consider graciously declining.
- Don't hold a meeting out of habit. The answer to "Why are we meeting now?" should not be, "Because we always meet now."
- Avoid devoting meetings to passive listening, such as, "Let's all go around the room and everyone spend five minutes saying what they're working on." Status-update meetings are often signs of poor information flow. On the other hand, if the meeting is designed to inform one person (usually the manager), then acknowledge the purpose explicitly.
- Keep the meeting small enough to be effective. 4-7 is ideal, 10 is tolerable, and 12 is the absolute maximum.
- Schedule the meeting wisely.
  - After two hours, meetings rarely achieve anything. An hour and half is the best time limit.
  - If meetings tend to go on too long, schedule them right before lunch or the end of work.
- Choose an appropriate venue. This means not only sufficient whiteboards and markers, but also enough seats for all participants (including those who aren't sure whether they can attend).
- Create an agenda.
  - Keep the agenda to a single page.
  - Solicit agenda items from participants in advance.
  - Set times for the start, the end, and when each item will be addressed. This will help keep participants from spending so long on the urgent but trivial items that they never get to the most important ones.
  - Address pending items from the last meeting.
  - The first 15-20 minutes are best for items that need the most creativity and mental energy.
  - No more than 20 minutes into the meeting, start the most compelling or time-consuming items. Don't save them for the end, when everyone just wants to leave and delay discussion until next time.
  - Make the items specific. "Discuss new proposal for reducing overhead costs in Philadelphia" is specific. "Review budget" is not.
  - Mark each item's objective, such as "For information," "For discussion," or "For decision."

- Bring extra copies of documents.
- If the meeting will discuss a deliverable, such as a product or report, distribute it in advance.
  - If the meeting will produce a document that hasn't yet been written, distribute an example (a.k.a. straw man) in advance anyway.
  - Don't bother to circulate papers that are too long to read. Keep them short or send summaries instead.
- Circulate the agenda and documents 48-72 hours in advance. Any shorter and people won't have time to read; any longer and people will forget.
- If you've invited participants whose insights you particularly want, tell them before the meeting so they can prepare.

After the Meeting

- Distribute brief action notes, including:
  - A responsibility chart – people, assignments/tasks, and deadlines.
  - Time, date, location, participants, and chair of this meeting and the next meeting.
- Talk to participants off-line, particularly:
  - To see how well the meeting went and whether people have suggestions for improving the next one.
  - To determine whether people are disgruntled, anxious, or otherwise uncommitted.

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