

Running Highly Effective Meetings

Leadership Toolkit

Before the Meeting: Ask Yourself

1. Why are we meeting?

- Do you have **clear goals** for the meeting?
- How does this tie to the organizational goal or priority?
- Can we **accomplish** the objective asynchronous?



✓ Do:

- Consider alternatives to a live meeting. 1:1 calls for alignment, emails are great for status updates.
- Share your “why” in the meeting invite. This shows attendees that you are respectful of their time.

2. What would best facilitate the discussion?

- Draft an agenda that focuses on achieving the meeting objective.
- Allocate time to agenda items to give attendees a sense of where to prioritize and focus.
- Assign roles to participants ahead of time to gain commitment.

✓ Do:

Frame your agenda as questions to maximize participation and trigger collaboration.

✗ Don't:

Be generic in your agenda items. Avoid terms like “Discuss”, “Brainstorm” and focus on desired behavior and outcomes.

3. Who needs to be present?

- **Avoid this pitfall!** Over-inviting makes a meeting less inclusive.
- Research suggests a **max. of 8 attendees** for effective discussions.



Narrow down attendees by:

1

Question who needs to be present accomplish the meeting goal. (Required attendees)

2

Make use of alternative communication to keep other stakeholders informed.

3

Call in optional attendees only if and when the discussion requires their expertise.

✓ Do:

Broadly distribute decisions made and meeting minutes to all stakeholders.

✗ Don't:

Invite more than 8 attendees. If you need more than 8 stakeholders, plan for breakouts!

4. How much time do we need?

- Thoughtfully consider how much time is needed to accomplish the **goal**.
- Set default meeting times for 15, 25 or 50 minutes in your calendar tools.

✓ Do:

Start meetings 5 or 10 min after the top of the hour (ex: 10:05 am).

✗ Don't:

Mindlessly schedule 30 / 60 min time slots because Outlook suggested it.

During the Meeting: Facilitate towards the Outcome

1. Start on the Right Foot

Ground the room and focus them on the objective, iterating why it's important to accomplish it

✓ **Do:**

For strategic / long meetings, have every attendee speak by sharing ONE word either tied to how they feel or what they'd like to walk away with.

✗ **Don't:**

Let small talk go on for more than 5 min. You're responsible for making this meeting a good use of everyone's time.

2. Engage Effectively Throughout

- Encourage participation: "Sasha, please share your thoughts."
- Make sure everyone has a chance to speak.
- Gently guide the discussion back to the main topic if it goes off track.
- Try different approaches; use silence if needed.

If the meeting is remote or hybrid:

- Use chat for larger meetings.
- Encourage attendees to turn on their cameras for better inclusion.

✓ **Do:**

Make use of a parking lot to "park" ideas or tangents that aren't immediately relevant to achieving the meeting objective, but worth considering in the future.

✗ **Don't:**

Leave loose ends. Nudge or assign attendees to close the loop on what is needed to ultimately achieve the goal.

3. How to End

- Summarize action items clearly: who is doing what.
- End on time and on a positive note.
- Let attendees know their input helps improve meetings for everyone!
Remind participants to complete the post-meeting assessment.



✓ **Do:**

Solicit feedback! Post-Meeting Assessments are a great way to continue improving your meetings and making them relevant to the attendees.

✗ **Don't:**

Ignore when the time is up. Ensure you wrap up the discussion and assign any takeaway items.

After the Meeting: Reflect

1. Communicate Effectively

Distribute meeting notes broadly to all stakeholders. Make sure they are accessible for non-participants to understand how decisions were made and be able to ask questions.

✓ **Do:**

Outline clear action items, including who is doing what and by when.

✗ **Don't:**

Assume attendees will complete their assignments and communicate to their broader teams. Ensure you actively encourage both!

2. Evaluate the Meeting

- Unsure if the meeting was effective? Turn on PMA (post-meeting assessments) in Kairos and send surveys for feedback.
- If your PMA has been active, review the data and experiment with changes based on feedback.



Appendix: Are you concerned about people who haven't been invited feeling that others experience FOMO?

Use the following templates! These templates are for gathering input from ancillary individuals before the meeting, in lieu of requiring attendance.

Template 1:

Dear Joel, Jane and Gordon;

As you may have heard, there is a group of us meeting (Jacob, Jessica, and Ivan) to talk about ideas on how to improve our vendor procurement process. We know that you have some experience with this process. We welcome any input you may have on the following questions:

1. Ideas you have to improve the process?
2. Any key issues you think we should be aware of as we attempt to make improvements?

If you could share your thoughts by the end of today June 1, that would be ideal. I know you are very busy so you may not have time to respond to this email, but any input is certainly welcome. Thank you in advance. I am also happy to loop back after the meeting on what was discussed.

Template 2:

Jack,

As you know, we are having a meeting to discuss initiative X. I am very sensitive about honoring your time. As I reflect on the agenda, I don't think your attendance is required per se. I also don't want you to feel left out.

I would like to propose the following: I will make sure a very good set of notes is taken. I will then share the notes with you. If after reading the notes you think you would like to come to future meetings, we can definitely revisit this. Otherwise, I can just keep you in the loop.

Does this solution seem reasonable? If you have any input on this topic, please just email me by Wednesday, and I will share it at the meeting.