Guide for effective meetings

This guide is designed to help leaders fine-tune and maximize their meeting effectiveness. By structuring meetings with intention, leaders can improve team alignment, decision-making, and overall productivity.

Inspired by “Death by Meeting” from Patrick Lencioni

Daily Check-In

**Objective**: Quick, informal alignment on administrative matters to maintain workflow, building connections and relationships.

**Key Features:**

* **Duration**: Up to 15 minutes.
* **Format**: Informal, standing (not sitting if able) to ensure the meeting stays short.
* **Focus**: Administrative updates, resource allocation, and connection - keep it light.

**Sample Questions to Guide the Check-In:**

* What is your top priority for today?
* Are there any immediate roadblocks or issues we need to be aware of?
* Is there anything pressing that’s changed since yesterday?
* Who needs support to stay on track?
* Any quick wins or updates to share?

**Tips for Success:**

* Encourage participation from all team members.
* Keep the tone casual but focused.
* Avoid diving deep into problem-solving - save this for a weekly or strategic meeting. Daily check-ins are the time and place for quick fixes until a sustainable solution is found to a more systemic problem.
* Use this time to reinforce connections and ensure alignment.

**Preparation Tips:**

* **Create a Shared Agenda**: Use a shared document or tool to list priorities and administrative updates for the day, ensuring all team members can contribute ahead of time.
* **Set Expectations**: Remind team members this is a quick sync - not the place for deep dives.
* **Track Ongoing Issues**: Keep a rolling list of unresolved issues from previous check-ins to follow up on progress briefly.

**Post-Meeting Summary:**

* **Highlight Key Takeaways**: Summarize the top tasks and immediate concerns raised.
* **Note Any Follow-Ups**: List any action items requiring follow-up during the week.
* **Use a Shared Tracker**: Update a simple tool with key updates so the team has visibility.

Weekly or bi-weekly Meetings

**Objective**: Review weekly or bi-weekly activities, track metrics, and address obstacles efficiently.

**Key Features:**

* **Duration**: 30-45 minutes.
* **Format**: Structured, seated (or virtual equivalent).
* **Focus**: Operational updates, procedural revisions, implementing & monitoring change initiatives, monitoring strategic objectives, and issue resolution.

**Agenda Template:**

* **Metrics Review:**
	+ Are we on track with key performance indicators?
	+ Any notable changes from last week?
* **Project/Task Updates**:
	+ What progress has been made on current priorities?
	+ Are there any significant delays or risks?
* **Obstacle Resolution**:
	+ What’s slowing us down or causing friction?
	+ Are there action steps we can take to address these?
* **Week Ahead**:
	+ What are the most critical tasks or events for the coming week?

**Tips for Success:**

* Keep the agenda tight to avoid straying off-topic.
* Use visuals (e.g., dashboards or slides) to simplify data reviews.
* End with clear takeaways and assigned action items.
* Ensure the opinions of all team members are shared at the meetings, including those not able to attend.
* Ensure all team members have time to share any wins or concerns to build commitment and accountability.
* Encourage all team members to provide input during the meeting to ensure diverse perspectives are heard and understood.
* Encourage the team to debate for and against new ideas and initiatives to ensure the team is considering all aspects of the problem to land on the best solution.

**Preparation Tips:**

* **Review Metrics in Advance**: Ensure metrics and performance data are updated and shared with the team ahead of time.
* **Gather Input**: Ask team members to share their progress and blockers a day before the meeting so you can structure the agenda effectively.
* **Create a Structured Agenda**: Include key points, timing, and goals for each discussion topic.
* **Assign Pre-Work (if needed)**: If complex issues are to be discussed, provide context or background materials to save time.

**Post-Meeting Summary:**

* **Document Key Decisions**: Note what decisions were made, including updates on tasks and metrics.
* **Share a Recap**: Send a short email or update summarizing the discussion, including action items, owners, and deadlines. Ask all leaders to cascade progress to all team members not present at the meeting to enhance communication, buy-in, commitment, and accountability.
* **Follow Up on Obstacles**: Track any unresolved blockers and assign ownership for resolution.
* **Reflect on Meeting Efficiency**: Gather feedback on how the meeting went and what could be improved next week.

STRATEGIC MEETING

**Objective**: Dive deep into long-term issues, evolving opportunities, and critical topics that require detailed analysis and decision-making.

**Key Features:**

* **Duration**: 2-4+ hours.
* **Format**: Formal, planned, and seated (or virtual equivalent).
* **Focus**: Strategic issues that impact the team’s future and success.

**Preparation Checklist:**

* Identify and prioritize the key strategic topics. Ask team members for their input. This can be achieved via surveys, informational interviews, casual check-ins, etc.
* Distribute pre-reading materials and data ahead of time.
* Define clear goals for the meeting.
* Allocate time slots for each major discussion topic.

**Agenda Template:**

* **Intro & Purpose Setting (10-15 mins)**:
	+ What are today’s objectives? Make sure everyone agrees to the objectives before moving to the next step to avoid fragmentation and disengagement.
	+ Are there specific decisions we need to make? If appropriate, recognize it may take several meetings before final decisions can be made.
* **Deep-Dive Discussions**:
	+ Analyze critical challenges and opportunities.
	+ Brainstorm solutions and approaches. Ensure all team members speak and encourage a debate. It is important to lean into difficult conversations and conflict to ensure the best decisions are being made.
	+ Discuss the strategic implications of current decisions.
* **Decisions & Next Steps**:
	+ What conclusions have we reached?
	+ Who is responsible for implementing each action item?
	+ What are realistic timelines?
	+ What additional resources will be required to for a successful outcome?
* **Reflection & Closing (10 mins)**:
	+ What went well in today’s discussion?
	+ Are there areas for improving future strategic meetings?

**Tips for Success:**

* Promote open dialogue and debate - avoid shutting down differing opinions.
* Break up the meeting with short breaks to maintain focus.
* Use a skilled facilitator to guide the discussion if needed.
* Ensure decisions and action steps are documented and communicated afterward.

**Preparation Tips:**

* **Define Clear Goals**: Clarify the objectives of the meeting, e.g., solving a strategic challenge, making a high-stakes decision, or creating a roadmap.
* **Pre-Distribute Materials**: Share relevant reports, presentations, or context documents at least 3-5 days before the meeting.
* **Invite the Right Stakeholders**: Ensure the people attending have the knowledge and authority to contribute meaningfully to the discussion.
* **Prepare Questions to Spark Dialogue**: Anticipate key discussion points and prepare questions that encourage analysis, brainstorming, and debate.
* **Allocate Time Wisely**: Create a time-blocked agenda that ensures enough time for in-depth discussion and decision-making.

**Post-Meeting Summary:**

* **Comprehensive Recap**: Provide a detailed summary of the discussions, decisions, and strategic direction established.
* **Highlight Key Insights**: Document important takeaways that could shape future plans or strategies.
* **Action Items and Deadlines**: Clearly list what actions need to be taken, by whom, and by when.
* **Evaluate Strategic Progress**: Reflect on how the meeting contributes to broader strategic goals and identify any gaps or next steps.
* **Communication**: Discuss how and when relevant information will be shared with remaining team members.
* **Feedback for Improvement**: Encourage participants to share feedback on the process to improve future strategic meetings.

General Tips for All Meetings:

**Leader’s Pre-Meeting Checklist:**

* **Set Clear Outcomes**: Know what you want to achieve by the end of the meeting.
* **Align the Team**: Ensure the team understands the meeting's purpose and expectations.
* **Create Space for Contributions**: Encourage participants to prepare insights or updates in advance.
* **Test Tech Tools (if virtual)**: Ensure tech platforms (e.g., Zoom, Teams) are working smoothly and shared files are accessible.

**Leader’s Post-Meeting Checklist:**

* **Distribute Notes Promptly**: Send summaries or minutes within 24 hours to keep momentum.
* **Monitor Accountability**: Track action items in a central system to ensure follow-through.
* **Seek Continuous Improvement**: Regularly review how meetings align with team objectives and adjust formats as needed.

By adding these preparation and follow-up elements, leaders can create a disciplined approach that maximizes the efficiency, alignment, and value of every meeting.