



Checklist: Effective Meetings

Before Meeting

- Ask if you *really* need a meeting, and if so, who *must* attend
- Build an *agenda* with a clear purpose for each item:
Give information, Get input, Reach a decision
- Send agenda and related materials to participants *before* the meeting

During Meeting

- Begin on time* and end on time (or early)
- Review agenda/purpose* and any open actions from last meeting
- Establish *meeting norms* and manage time
- Ensure one person is responsible for recording *actions and decisions* including owners and due dates

After Meeting

- Schedule* next meeting or other follow-ups if needed
- Role model *closing actions* that you own and support others in completing actions and executing decisions
- Manage* real-time actions and decisions log and status:
Complete, In Process, Not Started

Purpose	Format Style	Description
Give Information	Update or Inform	Providing information only, no decisions are required. Examples include for education, information or progress update.
Get Input	Dialogue	Used for contentious or "taboo" topics that are seldom discussed long enough to reach agreement. Ideal for exploring all possible options and best if separated from decision-making time.
	Brainstorm	Ideal for problem solving , creating new thinking and surfacing the best ideas in a short period of time.
	Review	Applied to gain insight into what will be needed to maintain alignment and to understand lessons learned.
Reach a Decision	Decide-Authority or Approval	Ideal for time-sensitive matters, decisions by an executive decision-making body and/or when experts/authorities have already debated off-line.
	Decide-Democracy	Used for decisions involving coalitions or working teams where each member votes for a specific option.
	Decide-Consensus	Ideal for situations or topics that could greatly benefit from wisdom of collective team. Discuss potential decision(s) until you arrive at solution/decision that everyone can live with.