



# Best Practices and Tools for Effective Meetings

*“Meetings are messy affairs. It has been said that a meeting is an event where people speak up, say nothing, then all disagree; or a place where you keep the minutes but throw away the hours.”* – Mel Silberman

Given we spend so much time in meetings, it's worth the investment to make them as effective as possible!

At Berlineaton, we endeavour to model effective meetings consistently. To do this, we pay attention to 3 key elements: (1) Preparation, identifying whether a meeting is even required, determining the meeting's objectives and logistics, and communicating these to participants in advance; (2) Delivery, coming prepared to participate, facilitating to the meeting's timeline and objectives, and capturing action items; and, (3) Follow-up, measuring performance and circulating action items and feedback.

On this page, we describe best practices for each element of the meeting process. On pages 46-48, we provide 3 tools to help you increase the effectiveness of the meetings you attend.

Learn more at [www.berlineaton.com](http://www.berlineaton.com)

## 1 Preparation



1. Determine if you need a meeting and what type you need (e.g., for information, for decision).
2. Establish specific meeting objectives.
3. Determine who and how many people should attend based on the meeting's objectives.
4. Decide when, how long, and where the meeting should take place.
5. **Develop an effective agenda (Tool 1).**

## 2 Delivery



1. Start (even if everyone hasn't arrived) and end on time (this will help get people back for your next meeting).
2. Begin with an overview of the purpose, agenda, and expected outcomes. Establish ground rules which layout how people will conduct themselves and assign roles such as scribe and timekeeper (if necessary).
3. Confirm who is leading the meeting (chair), managing time and participation, and keeping track of **action items (Tool 2)**.

## 3 Follow Up



1. **Measure your performance (Tool 3)** and keep track of the meeting's performance score.
2. Circulate actions and session notes within 24 hours.



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On slides 46-48, we provide **3 tools** you can use for preparation, delivery and follow-up for your meeting to make your session more effective.

## Meeting Element: Preparation

In preparation for your meeting, **develop an effective agenda** and **distribute it in advance** to meeting participants.

### Your agenda should include:

- ☐ Date, time and location of the meeting
- ☐ Who is expected to attend
- ☐ Preparation required for effective use of time and action planning
- ☐ Meeting objectives
- ☐ Beginning and ending time
- ☐ Time allocated to each item

## Tool 1: Meeting Agenda Template

### Date and Time

Date and time of meeting.

### Location

Location of the meeting.

### Participants

Decide who and how many people should attend, and establish roles (e.g., scribe, timekeeper, etc.)

Note the **preparation required** for effective use of time and attach supporting materials.

List specific **meeting objectives** that are achievable in the duration of the meeting:

- Objective 1
- Objective 2
- Objective 3

Provide a list of agenda items, including the **start time**, **end time**, and the **time allocated to each item**.

### Time

### Agenda Item

Start time

- Welcome and introductions
- Confirm agenda

Time allocated to each item

Include 1 line item per meeting objective

Confirm actions and next steps

End time

Adjourn



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## Meeting Element: Delivery

- ❑ **Specific actions** are one of the most important outcomes of effective meetings.
- ❑ Assign someone to **capture action items throughout your meeting** using a template such as the one provided on this page.
- ❑ **Review and confirm the action items at the end of the meeting.**
- ❑ For recurring meetings, **consider starting with a review of actions from the last meeting.**

## Tool 2: Action Tracker Template

Action	By Whom	By When	Status
Have the scribe capture the actions from the meeting. Actions must have specificity, accountability and urgency.	Assign a specific person/ people for each action. Do not commit people to actions if they are not part of the meeting.	Assign a specific date for completion for each action.	Confirm what has been completed and what still needs to be done. Record action related KPIs over time to see if they are having a positive impact.
E.g., Circulate meeting notes.	E.g., Jenn M.	E.g., Jan 1, 2022	E.g., To Do, In Progress, Done or Delayed

# 30 Best Practices and Tools for Effective Meetings

## Meeting Element: Follow Up

- Include some aspect of **measurable performance reporting**, such as a short session evaluation or end-of-meeting debrief.
- Tailor this to your specific needs and include elements such as those provided in the session evaluation template on this slide.

## Tool 3: Session Evaluation Template

Item	Example Criteria	Score Out of 10
Objectives	<ul style="list-style-type: none"> <li>To what extent were the objectives clearly stated and understood? Achieved?</li> </ul>	<p><b>Provide a score out of 10 for each criteria</b></p> <p><b>1 = low</b> <b>10 = high</b></p>
Time, location and organization	<ul style="list-style-type: none"> <li>Did the meeting start and end on time? Did the meeting location/technology assist with its effectiveness?</li> </ul>	
Participants	<ul style="list-style-type: none"> <li>Did participants come prepared and actively participate? Was there shared ownership for the meeting's success? Were the right people at the meeting?</li> </ul>	
Agenda	<ul style="list-style-type: none"> <li>Were the agenda, timing, structure and flow appropriate?</li> </ul>	
Facilitation	<ul style="list-style-type: none"> <li>Was time managed effectively?</li> <li>Were all objectives discussed?</li> <li>Were you able to stay on track and defer items that required more time or input by others not at the meeting?</li> <li>Were actions recorded and agreed upon before the meeting adjourned?</li> </ul>	
<p><b>Performance Rating</b> = Sum of Scores / # of Criteria</p>		