



3 STEPS TO CREATE A COST EFFECTIVE MEETING

STEP **01** PREPARE THE MEETING



EVERY AGENDA SHOULD INCLUDE...

Title of Meeting
Date
Time
Place

People In Attendance
Relevant Handouts
Purpose of the Meeting

For Longer Meetings, Include Break Times

ALWAYS...

Review actions from previous meetings.

Add specific items for discussion.

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STEP 02 CONDUCT THE MEETING

Depending on the meeting type, assign roles for the meeting.

THE RECORDER

- Keeps track of vital meeting information
- Ensures accuracy of information
- Distributes meeting information to participants

Note: Many companies allow the recorder to have a laptop to take notes on. However, the rule stipulates the Recorder not have any internet accessibility in order to maximize efficiency.

THE LEADER

- Establishes ground rules: no cell phones, interruptions, do not interrupt one another, respect one another's ideas, stick to the agenda, start on time and end on time etc.
- Starts on time and directs the meeting
- Drives accountability – clarifies action steps, who is responsible and completion timelines
- Summarizes key decisions and determines date of next meeting

THE FACILITATOR

- Focuses group on the agenda and keeps time
- Ensures everyone participates
- Clarifies what is being said
- Clears up disagreements by either (a) agreeing to disagree, setting up another meeting to discuss it (if urgent), or moving the topic to a future agenda

THE PARTICIPANT

- Generates ideas
- Analyzes Information
- Makes decisions
- Implements the action plans according to the agreed upon timelines

STEP **03** EVALUATE THE MEETING

AT THE END OF EACH MEETING,
ASK YOURSELF...

What went well during this meeting?

What could be improved?

What was it like following a cost-effective meeting model?

What disruptive behaviors affected achieving the goal from the agenda?

How did you deal with those behaviors?

FOR THE NEXT MEETING,
YOU SHOULD...

Review minutes from the last meeting.

Understand what has been accomplished (and what has not.)

Give praise for accomplishments!

Determine the reason(s) “why” action item(s) were not accomplished.

What are you going to do differently and what support do you need to complete the action item(s)?

- ✓ IMPROVED DAY TO DAY OPERATIONS
- ✓ EMPOWERED LEADERS AND TEAMS
- ✓ STRENGTHENED WORKFLOW PROCESSES