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The Effective Meeting: A Checklist for Success

by Martha Craumer

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The Effective Meeting: A Checklist for Success

YOU'RE STRUGGLING through the meeting from hell: boring, pointless, and interminable—with people you detest. Lulled by the monotonous hum of voices, your biggest challenge is staying awake. When it finally ends, you stagger out, swearing to never meet with those people again. You decide that hell itself would have been a welcome respite from that session.

You're not alone. Meetings have become a popular target of corporate jokes, too often viewed simply as napping opportunities. But “productive meeting” doesn't have to be an oxymoron. Here's how to make sure that your meetings generate accolades—and useful output—instead of yawns and muttered curses.

Analyze your purpose and set clear objectives. Start by understanding why, exactly, you want to have a meeting at all. What do you hope to achieve? Make sure that a meeting is the best means to that end. If your goal is simply to disseminate information, a written memo or voicemail message may be a better, more time-efficient approach.

Meetings are most effective in situations that require interaction and input from multiple people—like brainstorming, problem solving, or decision making. Meetings also make sense when the topic or issue at hand is challenging or emotional, and it would be better to address the concerns and questions of your people face to face.

Once you understand the purpose of your meeting, develop a clear set of measurable objectives. These will drive your meeting agenda and help you stay focused during the meeting itself.

Create an agenda and distribute it in advance. Once you know the purpose of your meeting, create an agenda

designed to meet your objectives. Don't leave the outcome to chance. Remember that productive meetings require structure and planning.

If you're trying to reach a decision or solve a specific problem, make sure you provide the needed context, research, and parameters in advance, so meeting attendees have the background they need to hit the ground running. If it's brainstorming you're after, remember that structure is a critical part of creativity; plan for both getting wild and getting real.

The best meetings get everyone actively involved. All participants should have a reason for showing up. Justify each person's presence and encourage active participation by using the agenda to assign roles and make clear what you expect each person to contribute. Then distribute the agenda and any prework well in advance so that people have a chance to think about the topic and prepare their contributions.

Make sure your agenda is realistic. Don't try to achieve more than the meeting time comfortably allows. One way to do this is to include time limits for each topic on the agenda—say, two minutes to introduce a new team member, 10 minutes to discuss the production schedule, and so on. Think carefully about how much the group can realistically cover in a given period of time. An overly ambitious agenda can lead to rushing over important items; an unfinished agenda can be demoralizing, and lead to yet another meeting.

Be sure to bring extra copies of the agenda to the meeting—one for each participant.

Invite the right people—and the right number. Whom and how many people to invite depend on the purpose

of your meeting. If the purpose is to quickly share critical information with as many people as possible, the group can be as large as necessary. But if interaction is critical, size becomes more important. Too many people can stifle creativity, and too few can limit input and stymie progress. Five to eight is a good range to aim for.

Start by reviewing your objectives, then think about who can help you achieve them. Sometimes the answer will be obvious, as when specific expertise is needed. At other times a broad, cross-functional group of people is more effective. Either way, it's often useful to talk to people ahead of time to lay the groundwork for the outcome you hope to achieve. Advance “lobbying” can make the meeting go more quickly and smoothly.

If the meeting group is large, break into smaller groups to work on specific tasks or problems, then reconvene to share results.

Be considerate of everyone's time. If an individual is needed for only part of the meeting, plan the agenda to allow for an early departure or late arrival.

Set ground rules. An effective way to manage expectations and ensure a smoothly run meeting is to set ground rules up front. If you're meeting with the same group of people on a regular basis, the group can develop these guidelines together. Otherwise, suggest some ground rules at the beginning of your meeting and get buy-in from the attendees. This is also the time to appoint a meeting scribe to capture the meeting highlights.

The best guidelines encourage participation by everyone, keep the meeting on track, and help maintain control of the proceedings. For example, your group may decide to let only one person speak at a time, disallow interruptions, set time limits on contributions, table issues that aren't easily resolved, limit conversations that stray from the topic at hand, and make sure that everyone is heard from. Although you'll want to

discourage disrupters, be sure to encourage differing points of view.

Often the most thoughtful or creative people are the ones least likely to speak up in a meeting. To make sure you collect everyone's input, survey the attendees, take a straw vote, or go around the room to get the opinions of each person present. A systematic approach ensures that all voices are heard. And when all attendees feel they've contributed, widespread buy-in and cooperation are more likely.

Start and end on time. No one ever complained because a meeting ended on time. Show respect for the time of those present by sticking to the meeting schedule.

Start by reviewing the purpose of the meeting, why it's important, and what the objectives are. Make it clear that you'll be starting and ending on time—then do so. Many meeting planners find it useful to appoint an official time-keeper who works with the facilitator to keep things on track.

To keep things moving forward, focus on your objectives and manage each segment of the meeting. Table any issues that can't be resolved, try to keep attendees from sidetracking the discussion or going off on tangents, and limit question-and-answer periods. Be sure to check in with participants regularly to make sure the meeting is on track and that everyone feels they're getting value from it.

If you do fall behind schedule, work with the group to prioritize the remaining agenda items instead of rushing through everything and achieving little—or making the wrong decisions.

If time runs out in the middle of a particularly fruitful discussion, vote on whether to go beyond the scheduled end time. And be sure to allow time to wrap up the proceedings.

Clarify action steps and responsibilities. Without a plan for moving forward, even the best outcomes can

Give Your Standing Meetings a Makeover

Some of the most dreaded meetings are those regularly scheduled gatherings that seem to be called out of habit or a sense of duty. Staff meetings, progress report meetings, and sales meetings all fall under this rubric. They are valuable not only for the information shared but also for the face time they offer. However, their importance doesn't necessarily make them interesting. Meeting with the same people in the same room every week to discuss the same topics can get boring, resulting in many empty chairs—and lack of enthusiasm among the remaining attendees. Here are some ways to keep your regular meetings fresh—and attendance high:

Regularly review the meeting's purpose. From time to time, remind participants of the reasons for meeting, and ask if the meeting still serves that purpose. For example, a project team may hold twice-weekly status reports at the beginning of a project, when there are a lot of new developments and many decisions to make. Once the initial frenzy subsides, there may only be enough new information to warrant a monthly meeting.

Solicit agenda items from the group in advance. This gives attendees a chance to bring up issues that are of interest to them. If, on a given day, you determine that there aren't enough items of sufficient gravity to warrant a meeting, then cancel that session.

Rotate leadership of the meeting. Have each attendee take a turn running the meeting—setting the agenda, preparing materials, and introducing topics. It's a great way to inspire ownership of the meeting.

Ask for feedback. At the end of each meeting, ask the participants how they think it went. "Did we spend an appropriate amount of time on each agenda item?" "Is there a better way to structure the meeting?" Armed with this information, you can better plan future meetings.

languish as the initial enthusiasm and commitment dwindle away. The key is to keep the fires stoked. How? By creating an action plan—and sticking to it.

As a group, discuss and agree on specific action steps and responsibilities, along with clear time frames. Identify possible problems or challenges that might hinder progress, and discuss who will take responsibility for resolving them, and how.

Things to consider: what resources are needed, who must provide input or permission, whether further research is necessary, which other people should be involved, and what else is needed to move forward. This is also a good time to set up a follow-up meeting.

This action plan is the heart of your meeting—the critical outcome—and a

key task of the meeting scribe is to capture it in writing.

Follow up—and follow through—promptly. When the meeting is over, the follow-up begins. Without this critical activity, your action plan will likely be felled by inaction.

To drive your action plan forward, make sure that the meeting scribe sends out the meeting notes promptly—within two days. Detailed minutes are less important than a summary of the meeting's key points, decisions made, action steps, responsibilities, and time frames.

Make sure that the meeting notes are distributed not just to meeting participants, but to anyone who will be affected by the decisions made or the actions taken.

As the deadline for each action step approaches, follow up with those responsible and get a progress report. If deadlines are slipping, offer to help. The key is to maintain the momentum and commitment needed to drive home the outcome put in motion during your meeting. Then all participants can enjoy the satisfaction that comes from working well and productively together. That just might start to give meetings a good name.

—MARTHA CRAUMER *is a freelance writer based in Cambridge, Mass.*