STRATEGIES TO EFFECTIVELY LEAD AND PARTICIPATE IN MEETINGS

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Effective Meeting Checklist:

Whether you are the meeting facilitator or a participant, use this checklist to help you make your next meeting a successful, effective, and maybe even fun experience.

Before The Meeting:

____ Define the purpose of the meeting. Set clear objectives that lead to tangible outcomes and illuminate the "why" and the destination in which you want to go.

____ Develop an agenda in cooperation with key participants. Determine who needs to be there and why.

____ Distribute the agenda and circulate background material, lengthy documents or articles prior to the meeting so members will have enough time to prepare, get involved and get up-to-date.

____ Prepare yourself. Get all materials, information, and talking points ready beforehand. Play out different scenerios in your head so you have an idea of how to handle different feedback/reactions.

____ Choose an appropriate meeting time. Set a time limit and stick to it, if possible. Remember, members have other commitments. They will be more likely to attend meetings if you make them productive, predictable, and as short as possible.

____ Choose a location suitable to your group's size. Small rooms with too many people get stuffy and create tension. A larger room is more comfortable and encourages individual expression.

____ If possible, arrange the room so that members face each other, i.e., a circle or semi-circle. For large groups, try a U-shaped configuration.

____ Use visual aids for interest (e.g., posters, diagrams, etc.). Post a large agenda up front to which members can refer.

____ Be sure everyone knows where and when the next meeting will be held.

During The Meeting:

____ Greet members and make them feel welcome, even late members, when appropriate.

____ Don't update latecomers. Instead, ask another member of the meeting to catch them up at the conclusion of the meeting. This will ensure you stay on track with your time and respect the other members of the meeting.

____ Start on time. End on time.

____ Review the agenda and set priorities for the meeting.

Facilitator Success Factors:

- Think of yourself as a "conductor."
    - Is everything is running smoothly in accordance to the agenda?
- Make sure topic presenters/facilitators are prepared prior to the meeting.
    - Are all members aware that they will be presenting information?
- Redirect questions to the group.
    - Have you gotten everyone's input on the topic?
- Maintain crowd control.
    - Does everyone have an equal opportunity to speak?
- Be inclusive.
    - Have you given yourself a chance to add your input?
- Use the WAIT rule (Why Am I Talking?).
    - Are you allowing enough time for group members to share?

Participant Success Factors:

- Understand your role.
    - What are you going to contribute (knowledge, skills, expertise)?
    - Are you representing yourself or somebody else?
    - Do you have decision making responsibility?
- Review agenda and materials beforehand.
    - Are you prepared with what is expected of you at the meeting?
- Arrive early.
    - Do you need to do any pre-work to prepare for the meeting?
    - Do you need to speak with another member prior to the meeting?
- Be an active participant.
    - Is your voice being heard?
    - Have you addressed everything that you wanted to?
- Follow ground rules.
    - Have ground rules been established?
    - If you are filling in for someone else, have you been informed about the ground rules?
- Keep questions and comments relevant to the topic.
    - Are you fully engaged in the conversation?
    - Are there distractions? How can you eliminate those distractions?
- Leave meeting when it is scheduled to end.
    - If the meeting is running over time, why is this? Has the meeting been productive?
    - What obligations do you have to fulfill after the meeting?

If You Want Your Message To Be Heard (Both Inside And Outside Of The Meeting):

- Consider your audience.
    - How can you present the information in a way that will get heard?
- Don't undersell yourself with weak words.
    - How can you switch out weak words with stronger ones (i.e. I "think" vs. "I recommend")?
- Don't pose statements as questions.
    - How can state your ideas so people know you feel strongly about them?
- Avoid speaking too high, fast, or quietly.
    - What tone of voice will you use so that others are able to easily understand you?
- Watch your body language and eye contact.
    - Are you presenting in a way that increases engagement and connection with others (open vs. closed positions, eye contact, head nodding, etc.)?
- If you want people to take your ideas seriously, present them seriously.
    - Are you presenting your ideas in a serious way that gets heard by the group?

At The Conclusion Of The Meeting, Wrap It Up To Show Progress:

- Restate key points for clarification and closure.
    - How effective was the meeting?
    - Have you provided clarification and closure to all agenda items?
- Tie emerging threads together.
    - Where are you able to tie topics together to help bring better understanding?
- Recognize common ground.
    - Where did people share common understandings?
- Summarize outcomes and how follow up will be accomplished.
    - Have you identified next steps (responsibilities, follow ups, next meeting, etc)?
- Address what to do with "parking lot" issues.
    - Are there topics that were brought up that you haven't adressed?
    - How will you address those issues (delegate it out, put it aside for next meeting, etc)?
- Plan for the next meeting.
    - What can participants expect at the next meeting?

After The Meeting:

- Send meeting notes, key takeaways, and follow up actions.
    - Do participants have what they need to successfully move forward with their duties?
- Follow up on any assigned items. Check in with others if follow up assignments might be confusing.
    - Do all participants have clarification and the materials needed for their assigned tasks?
- While fresh in your mind, use "parking lot" list and open items to start the next meeting's agenda.
    - What "unfinished business" do you have to still address that can be done at the next meeting?

What will you START, STOP, and CONTINUE to do as a result of this video to produce more effective meetings?