



Successful Meetings: Before, During, And After





Before: Prepare

The old adage is: “failing to plan is planning to fail.” This is especially true with a high- stakes meeting such as a leadership off-site. It’s critical to prepare by considering goals, roles, process, and interpersonal relations.

Goals

- Why are you meeting in the first place?
- What are you trying to accomplish?
- What issues/problems are you trying to solve?
- How will you know if the meeting has been successful? Is a meeting the best way to achieve the goals?

Roles

- Who will be involved in the meeting, and what will they do?
- What will the leaders of the organization say and do? What should they not say and do?
- Which other members of the team need to prepare a presentation in advance?
- What pre-meeting assignments do you need to make sure all participants understand their roles and come prepared to focus on the topics at hand ?

Process

- Develop a plan to maximize the effectiveness of the meeting.
- Plan breaks and snacks or meals to keep participants energized and focused.
- Vary the format of activities to include presentations, individual work, partnership and small group activities, large group discussions, physical activities, and fun.
- Pay attention to timing and placement during the day to recognize natural cycles of high and low energy.
- Prepare an agenda for all participants.

Interpersonal relations

- Be aware of interpersonal strains that can disrupt or derail the meeting.
- Determine which activities should involve mixed groups/partners and which should involve intact teams.
- Recognize any individuals who have the potential/propensity to disrupt the meeting and plan strategies to manage them.



During: Execute

The adage is: “plan your work, work your plan.” It applies to successful meetings – but only to an extent.

Work Your Plan

- Follow the plan you developed for the meeting.
- Facilitate open discussion while keeping Goals, Roles, Process, and Interpersonal Relations clearly in mind. Make sure participants feel heard and valued, while insisting that real issues are acknowledged and addressed.
- Monitor the time closely.
- Recognize that no plan is perfect. Make necessary adjustments along the way. If a discussion or activity takes a little longer than expected that can be okay – if it is productive and effective.
- Recognize when it is appropriate to cut an activity or discussion short or defer a “parking lot” issue.

Re-Work Your Plan

- Pay close attention to group and individual comments and monitor reactions.
- During break, check in with key stakeholders.
- Be prepared to add, omit, or re-sequence activities and/or discussions to help the group achieve their goals.
- Be prepared - if necessary - to call for a quick unscheduled break in order to confer with key stakeholders and plan necessary adjustments.

After: Follow Up

Any meeting – even a very successful one – is only a starting point. Most of the work of the meeting actually happens afterwards. Make sure every person and every work group leaves with a clear plan that outlines *who will do what by when and how you will follow up to monitor progress and assure success*.

- Transcribe the notes from all flipcharts, highlight all action items, and forward notes and action items to meeting participants.
- If the meeting raised additional issues or questions that were not addressed, develop a plan and a timetable to follow up.

Follow up on work plans to make sure details are specified, to identify potential obstacles or barriers, to monitor progress, and to coach for necessary adjustments.