



Tips for Running Effective Planning Meeting

Goal: To run efficient meetings that achieve a stated goal or objective and leave participants feeling energized.

1. Define the meeting objective. A successful meeting serves a specific purpose. Know the desired outcome before you call the meeting.

- Do you want a decision?
- Do you want to generate ideas?
- Are you making plans?
- Are you getting status reports?
- Are you communicating something?

2. Prepare an agenda.

- Prioritize – what absolutely needs to be covered?
- Results – what do we need to accomplish?
- Participants – who needs to be there to make it successful?
- Sequence – in what order will you cover the topics?
- Timing – how much time will you spend on each agenda item?
- Logistics - when (date and time) and where will the meeting take place?

Circulate the agenda prior to the meeting to get feedback and to let participants know what to expect so they can prepare accordingly.

3. Use allotted time well.

- Start on time, even if people are missing.
- End on time.
- Begin by stating the meeting objective. Any discussion that does not address the objective needs to be set aside (put in the “parking lot”), unless there is agreement that the digression is important.
- Assign a time keeper to let participants know when to wrap up discussion of each agenda item.

4. Empower the meeting facilitator to keep the process moving according to the agenda.

- Make sure everyone has a chance to make their voice heard during the meeting.
- Summarize each agenda item at the close of that segment, review action steps and get group acknowledgement.
- Watch body language – Does the group need a break? Did someone say something that might have offended a person or the group?
- Ensure that the meeting stays on topic.
- List all tasks that are assigned, make notes of person responsible and their deadline, if any.
- Decide whether items in the “parking lot” need further discussion and determine how they will be followed up.

5. Wrap-up the meeting on or before the designated time.

- Summarize next steps and let everyone know that you (or someone else) will be circulating minutes by a certain date.
- Review assignments and each team member’s responsibility.
- Brainstorm objectives agenda items for next meeting.
- De-brief the meeting. Did you meet the objective(s)? What went well? What could have been better?

6. Follow-up.

- Prepare and send out minutes by expected date.