

EFFECTIVE MEETINGS GUIDELINES

This document provides a specific set of practices designed to aid effective meeting execution and bolster productivity in team settings.

Three Principles of Effective Meetings

1. **Prime the Pump**—Prepare in advance to set up a productive meeting.
 - *Choose Roles*—Facilitator, Timekeeper, Recorder, and Champions
 - *Filter Ruthlessly*—Information or conversation? If it's simply information, find another way to convey.
 - *Champion Your Cause*—Everyone is responsible for making meetings relevant and helpful. Submit agenda items and prepare in advance to present them in the most concise and compelling way possible.
2. **Stay on Track**—Run the meeting efficiently.
 - *Set a Clear Agenda*—Have a specific goal: “By the end of this meeting, we will have accomplished ...” Build everything else backward from there. If you have more items than time, conduct triage, deal with only the most vital, and postpone or reroute the remainder.
 - *Slow Down for Yellow Lights*—“Green lights” are projects or decisions that are happening, “red lights” are not, and “yellows” require input and decisions. So, get to green and red quickly, and slow down to discuss the yellows in depth.
 - *Kill the Rabbits*—Recognize when the conversation has taken off on a tangent (“going down a rabbit trail”). Put bigger issues into the “Parking Lot” for a future meeting.
3. **Finish Well**—Conclude clearly and plan next steps.
 - *Leave Room to Wrap*—Set aside the last 5–10 minutes of every meeting to properly wrap up with any Q&A and next steps. Finish on time or a few minutes early.
 - *Always Finish with Next Steps*—Revisit all action items and milestones, and post them publicly (e.g., via email) within 24 hours of the meeting.
 - *Plan the Next Meeting*—Change roles, review/revise all action items, and adapt the meeting structure to fit the needs of the organization.

Effective Meeting Roles

For meetings to run effectively, participants need to know the role they are playing and how their role contributes to the overall goal of the meeting. In order to build capacity within a team, roles should rotate regularly.

- **Facilitator:** Solicits input for the agenda. Filters suggestions to include only the most vital. Finalizes and distributes the agenda. Leads the meeting. Coordinates with both the Timekeeper and Recorder.
- **Timekeeper:** Assesses estimated times for each agenda item to ensure a balanced meeting. Ensures a prompt beginning. Tracks time allotted and calls for reassessment/reprioritization if a given item will go over its time block. Facilitates transitions between agenda items. Preserves time at end of meeting for an effective wrap-up.
- **Recorder:** Notes all action items (*who* does *what* by *when*), Parking Lot issues, and decisions (broader policy directives that do not require an explicit action). During the course of the meeting, the Recorder captures any information that falls into one of these three buckets—especially incomplete action items. At the conclusion of the meeting, the Recorder restates all defined action items and decisions, solicits input to complete any open actions (*who*, *what*, *when*), including follow-up on Parking Lot issues. Within 24 hours of the meeting's conclusion, the Recorder posts all action items publicly (e.g., via team email, intranet, work room, etc.).
- **Champions:** Any members of the team who choose to sponsor an agenda item. It is everyone's responsibility to advance topics and issues the larger team should discuss or decide upon. Champions must send a proposed agenda item to the Facilitator in advance of the meeting with a brief description, a desired outcome, and an estimated timeframe to discuss the issue. They should then **prepare a concise, effective proposal/synopsis** covering five steps. This high-level proposal should distill thinking, frame the issue, propose solutions, and elicit conclusions (while sticking closely to time allotted).

Things Not to Do

- **Facilitators:** Do not monopolize the discussion or overtly advance a personal agenda.
- **Timekeepers:** Do not stifle productive discussion to adhere to arbitrary allotments (anticipate and renegotiate).
- **Recorders:** Do not act as a stenographer—stay at a high level and remain vigilant for incomplete actions.
- **Champions:** Do not bring ill-defined problems to the table—you are the subject matter expert. Frame, educate, and motivate.