



Tip Sheet: We have to stop start meeting like this: Four essential practices

Meetings, meetings, meetings...We all spend plenty of time in them, and just like me, I'm sure you've had your share of annoying ones. Add to that the multiple on-line platforms many of us are now using and we're sure to have additional challenges or potential frustrations.

What's a person to do? Start by following the four tips below -- good practice -- regardless of whether you're on-line or in person. One bonus is included that you may not have thought of.

(Even if you already know these practices, given all the meetings I see that don't follow them, they bear repeating...)

1. Have an agenda

One of the biggest mistakes I see with meetings is not having an agenda or clear delineation about roles. Make sure you have one!

What do you hope to accomplish?

What topics will you cover to reach that intent?

Who is responsible for leading each topic/agenda item?

Write the agenda down so everyone can see. Or, if you're on line, post it on a shared screen. Check off each topic as you cover it so you can all see progress.

2. Keep simple notes

I have yet to see a meeting where complex notes are necessary. Simple meeting records fine and are essential to:

- Keep track of what you agreed to
- Offer a history of project progress
- Can be referred to in orienting new team members.

See the next page for a bare-bones template to keep track of your meeting progress.

| Agenda item | Who's done what (progress until now) | What's next? (action steps or follow up or "to dos") | Who's responsible for each what's next? | Where does it link?* |
|-------------|--------------------------------------|--|---|----------------------|
| Topic A | | | | |
| Topic B | | | | |
| Topic C ... | | | | |

*I.e., who needs to do something before or after X task so that the sequencing of activities keeps moving forward? I've noticed this segment is often forgotten.

3. If you're using technology, assume it will have glitches -- no matter how often you use it or test it.

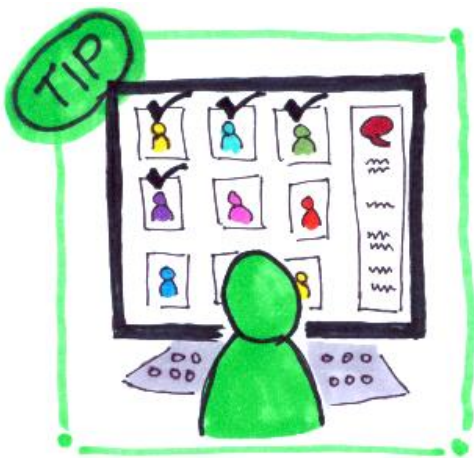
To cover these eventualities, consider adding the following to your routines:

- If you use a "polling" function, read the options in the poll in case someone is only phoning in
- Mute everyone but the speaker
- Have a technical person behind-the-scenes in case of snafus.

4. In an on-line world, don't routinely assume you need a video call

An old fashion conference call may be fully sufficient for your needs. When you're clear about what you want to accomplish (See Tip 2 in the first section and Tip 1 in this section), then you can decide **how** (e.g., video call¹, audio call) to proceed.

5. BONUS: Learn to value, and start each meeting with, a check-in.



When I lead meetings, I regularly recommend some way for people to get acquainted and/or warmed up to the topic. Often, I get reluctance from meeting organizers saying it's not the "real" work. Yet, without the "relationship" dimension of the "task-relationship continuum" we facilitators refer to, our efforts are often less than ideal.

Paying attention to the relationship aspect is even more important in on-line environments. When we're interacting online, we lose our daily rapport with colleagues and the

¹Zoom is not the only option here. Other video meeting services include: Cisco web-ex, Facebook rooms, Google meet, Go-to meeting/Go-to webinar, Microsoft team.



Tips for meetings – particularly on-line

energy we get from them has flattened. We need time to connect with each other.

A check-in is one solution. A check-in, typically done by having everyone share a **short** update, (with no expectation to explain oneself and that “pass” is completely acceptable) sets the tone that everyone’s participation is important and helps us re-establish that connection.

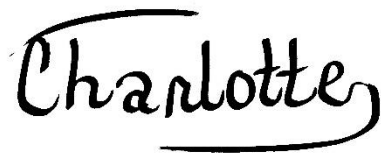
Plus, knowing our colleague’s emotional temperature helps us offer appropriate support to get the work done -- as well as allows us to ask for a boost for ourselves when we need it.

Here’s to using everyone’s time well. I’d encourage you to adopt all these practices, and look forward to hearing how it’s going.

We at **envision** aspire to meeting magic – where great people come together and accomplish, oh so much more, than one could alone. To that end, **envision** would be pleased to:

- Coach you in [planning your best meetings](#)
- [Facilitate](#) your next (on-line or in person) meeting – freeing you up from the multi-tasking described above, plus allowing you to experience the benefits of effective meeting practices
- [Capture your meeting discussion with visual notes](#) so that you’re all on the same page
- Lead a [capacity building session](#) on techniques for great meetings
- Help you figure out how to [evaluate](#) your meetings so they improve over time.

Happy Summer Solstice! Til next time... be well and stay healthy.



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Along the way, we [build thriving organizations](#) that both excel in carrying out their own work and magnify their successes as they work with others so collectively we advance a healthy planet.