Webinar Objectives

• Agenda Building

• Setting the right Meeting Length

• Solutions for your found Meeting Pain Points

• Note-taking strategies and tactics
Meet Means . . .

Coming Together for a Purpose
Why do Meetings Matter?
Know the Purpose

- Why
- What Topics
- What Discussions
- What Outcomes
- What Decisions
- What Work
Identify Outcomes

☐ What needs to be achieved?

☐ What decisions must be made?

☐ What do you want people to:
  ☐ Know?
  ☐ Be able to do?
  ☐ Feel?
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<th>Day &amp; Date:</th>
<th>Time: Start</th>
<th>End</th>
<th>Location</th>
<th>Purpose</th>
<th>Outcome</th>
<th>Time</th>
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What to Bring:
Meeting Agenda

- Day & Date:
- Time: Start       End

- Determining the length of the meeting...
Meeting Agenda

When should we use an agenda for our team and clients?

- Face-to-Face
- Conference Calls
- Technology “calls” or meetings
- Virtual exchanges and emails
Meeting Agenda

Pain Points
Getting Post-Meeting Action

• Use an Agenda

• Invite Commitment and Make Assignments

• Generate Minutes/Notes
  – Who will do What by When
  – Decisions Made in the meeting

• Check-in before the next meeting
Informal Minute Templates

Informal Minutes always include:
1. Day, Date, Year and Time of the meeting
2. The name of the meeting group
3. Meeting Attendees’ and Meeting Leader names
5. Supporting documentation or notes
Archiving Minutes

1. Date Order (DD, MM, YYYY)

2. Separate by meeting group, board or committee

3. Length of time to save:

4. Include attachments and meeting presentation materials
Remaining Meeting Challenges (pain points)?
Effective Meetings

Pre-

- Purpose
- Outcome
- Agenda

Meeting

- Facilitation
- Procedure
- Task
- Relationship

Post-

- Action
- Minutes

MEETING & MANAGEMENT Essentials
Better meetings for everyone.
Personal and Team Meeting Action Plans

☐ I/We will __________________

☐ By ____________________
Whatever you do, make meetings to the point, on time, and actionable!