Meeting Guide

FOCUSWISE
Curt Steinhorst

A world-class company has first-class meetings because people, work, time, and communication matter. Meeting failure impacts everything else.

Effective meetings generate open dialogue, healthy disagreement, respectful compromise, clear and timely decision- making, and a shared commitment to the go-forward plan.

Best Practices Checklist

You can (and should) opt out or leave a meeting when these elements are not included.

✓ **Have a clear agenda**
- Make the purpose of the meeting and the key discussion topics crystal clear. Leverage helpful templates to stay on track.

✓ **Use a "parking lot"**
- Set aside all items that are not critical to this meeting topic.

✓ **Strategize the start and end**
- Start on time, end on time.
- Begin with 5 min on goals; end with 5 min on next steps.
- Avoid back-to-back meetings — they deplete energy.

✓ **Shrink the size**
- Include the smallest number possible. Invite only the pertinent participants to the room, not those who only need to be informed.
- Let people opt out — make decisions without you, or provide asynchronous input before the meeting.

✓ **Define roles**

Establish who is doing what:
- Presenter/facilitator (responsible),
- Decision-maker (accountable),
- Subject matter expert (consulted),
- Note taker/disseminator.

✓ **Match time to scope**
- Tightly contain how much time is dedicated to each topic.
- Avoid arbitrary lengths. Block off the time needed to complete the discussion. Don't assume 30 min or an hour.

✓ **Prioritize the pre- and post-work**
- Don't think of meetings as 'where I start engaging this topic.' Meetings are not for information gathering. That occurs outside of the meeting.
- End the meeting by assigning next tasks with set due dates.

Not everything needs a meeting

Communicate asynchronously

Make relevant, updated information accessible. This is critical for supporting hybrid workstyles.

- Consider Loom videos as a replacement and/or primer for meetings.
- Create a team page for updates, agenda items, etc to reduce interruptions and better track progress.
- Store meeting notes in an accessible location so people don't have to attend to be informed.
- Provide opportunity for a larger group to provide input prior to the meeting.

Adopt consistent email standards

Apply labels to your subject lines:
- FYI – don't respond. If you are cc'ed or the email is forwarded with no subject line edit, it's an FYI.
- Action – include 'task + request by date' to subject line.
- Urgent – must include "urgent" in subject line + response requested by.

Why we meet: Decide · Bond · Learn · Do

We must commit to a disciplined rather than relaxed approach to how we structure and run meetings.