



THE KEYSTONE  
PARTNERSHIP, LLC



# Effective Meeting Management



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The pandemic and remote work schedules have changed how we think about meetings. You may be experiencing the same, and we thought we would take this opportunity to share our experiences, what has worked for us, and what has not.

1. **Don't skip or reschedule recurring meetings.** Recurring meetings are often scheduled months in advance. Under time constraints there is often a temptation, specifically with internal meetings, to assume communication outside of the meeting has been sufficient and that the recurring meeting may be cancelled. Our experience is that when the meeting we thought could be cancelled is not cancelled, we often find the resulting conversation was critical and necessary. The recurring meeting was established for a reason. If that reason has not changed, do not skip them.
2. **Constantly challenge why meetings exist.** Gathering team members for any period of time is an expensive endeavor. If the organization is not getting at least a commensurate benefit, cancel the meeting. If the purpose of the meeting is not clear, cancel the meeting. If participants are not participating, cancel the meeting.
3. **Consider decreasing the frequency of recurring meetings.** Considering the two points above, consider scheduling recurring meetings every two or three weeks instead of weekly. Meetings are costly, and if the benefit can be achieved in the aggregate while meeting on a less frequent basis, take advantage of that opportunity.
4. **Always provide a conference call option.** We see meetings scheduled when everyone is supposed to be in the office, and then schedules change, as schedules are now more fluid than ever. When some one's itinerary or calendar is revised, it is a disruption to issue conference call information after the initial meeting invitation. This disruption is particularly costly and confusing when conference call instructions are provided just before, or at, the time of the meeting start.
5. **Have an agenda.** From here our observations are fairly traditional, and worth a reminder. Always have a clear agenda in the invitation or otherwise communicated to the participants prior to the meeting. Participants' thoughts should be organized prior to the meeting, which is best accomplished if the agenda is clearly understood.
6. **Move the meeting along and avoid "weeds".** The agenda should be followed. Too much side discussion is not often useful. The meeting organizer should be respected and expected to identify when the conversation has drifted and when specific conversations may be best communicated outside of the formal meeting format. If there is nothing more to review in the meeting, end the meeting.
7. **Identify follow up actions and who is responsible.** Meetings should conclude with a task list, complete with who is responsible for the task and when the task is expected to be completed.
8. **Did you miss anyone?** Are all stake holders aware of the meeting discussion? Sometimes meetings drift for good reason or involve individuals not in attendance. Be sure to follow-up with those individuals to bring them up to speed. Open communication in the office is critical.