

SMART MEETINGS

SSCHEDULE

Schedule Meetings



Preparing for the meeting is just as important as having the meeting. So before scheduling reflect on:

- Is a meeting needed ?
- Can this be done over chat/email/ shared workspace

Calling for the meeting- You have decided you need the meeting:

- How much time do you need
- Is everyone you need available
- Should this be physical or remote?

Setting the timing of the meeting- reflect on when the right time is:

- Maybe Friday afternoon or Monday morning are not the best time?
- What else is going on that week?

MEANINGFUL

Make it count



Reflect on what you want to get out of the meeting, is this meeting to get a decision if so:

- Have you done the ground work
- Do participants have all the information
- Is it realistic to expect a decision

Preparing content for the meeting:

- Make sure documentation is clear and fit for purpose
- Highlight key focal areas for decision making or background information

Be prepared and allow time for discussions:

- Ensure that all participants are given the opportunity to share their input
- Anticipate and prepare for this

AGENDA

Set an Agenda



Set a clear Agenda for the meeting:

- Ensure that all participants know what to expect
- include the agenda in the meeting invitation for easy reference

Participants preparation

- If you need participants to prepare for the meeting, make this very clear in the meeting
- Give them enough time to prepare
- Make yourself available for questions, before the meeting

If you have documentation that needs to be read and reviewed prior to the meeting:

- Ensure this is sent in sufficient time, prior to the meeting
- Be respectful of their time and they will come prepared

RIGHT PEOPLE

Invite the right people



Who should be in the meeting?

- Do your homework, make sure you know who should be in the meeting.
- Do your stakeholder analysis and act accordingly

Most decisions have typically been made before the meeting, so make sure that:

- You have engaged with the right people prior to the meeting , so you can address any issues, before the meeting

Ensure that participants have the mandate to make the decisions required of them and are capable of doing so in the meeting.

TIMEBOX

Time box discussions



Own the meeting- you need to ensure that the meeting is facilitated

- Timebox your agenda topics and make sure you get what you need out of each agenda item.

Keep the meeting on track- If/when, you need to steer the discussion back on track-

- Wait for an appropriate moment to politely bring the discussion back.
- Always be polite

- Use tools like Microsoft Copilot, otter.ai or fireflies.ai to take notes during the meeting, so that you are able to fully participate and facilitate.
- Make sure everyone has a copy of meeting summary and actions