Handbook of Process Moves to Improve Your Meetings

I. Before setting the meeting: plan and design for clarity

What's your big picture and what's your bottom line?	Know your big picture, and don't lose sight of it. What do you need to get from this meeting? Where do you need the group to be by the end of the meeting?
	What is the driving purpose and story behind what you want people to agree with, do, and/or see the value in?
	What asks or calls to action do you need to make – or do you need someone else to make – to bring this project or proposal to life?
	Make sure you can clearly articulate your bottom line (your why, what, who, how, and asks).

Pro tip: consider the "outside-in" perspective in how you build and tell your story. How can you reshape the way you tell your story and the language you use to make it more relatable for your audience? In other words, what will your proposal or project mean to them? Is there a way to make it more relevant to their context?

Design and plan your conversations.	Go over your Clarity Checklist; make sure the building blocks for working with others have been established. How will you move your conversation through the interaction in a way that the Clarity Checklist elements are addressed for the group?
	How much time is truly needed?

Map out the stakeholders for this topic.	Know your stakeholders.
	Who will be affected by the proposed project outcome? Who will need to be informed?
	Who will need to participate in some form, either by contributing budget, personnel, knowledge, cooperation, or by getting out of the way?
	Know each participant's role. If someone has been invited to a meeting, there should be a reason. If you can't think of a reason for someone, maybe they shouldn't be on the list.
	Make sure you aren't missing a critical stakeholder or set of stakeholders. No one likes having their time wasted by coming to a meeting only to find out key viewpoints or groups aren't well represented.
	Whose support do you need? How will you get it? How do you plan to make that support visible?

II. In the meeting invitation or other communication to be sent before the day of the meeting

Set expectations.	Send an agenda; it's the civilized thing to do.
Give the audience a heads up.	Again, an agenda is helpful here. Help your attendees be attentive and focused by taking the time to let them know what you are aiming to do, presenting clear roles for making this happen, and sharing your goals for the meeting.

Pro tip: if you are expecting an invitee to represent a particular point of view or bring a set of knowledge or data to the table, inform them of this expectation in advance to give them time to prepare.

Leave room for extra cycles so that you can take care of your relationships.	If you are presenting a deck that includes inputs from others or speaks to the work of other teams, set up a work rhythm that takes this into account. Points to consider: create a process for receiving inputs, synthesizing inputs, and allowing for other relevant contributors to review what you've done with their content before presenting it. If you are expecting someone to make a decision in a meeting, consider informing this person of that fact in advance. Perhaps, offer to conduct a preview of the deck prior to the meeting.

Pro tip: if you are going to highlight a deficiency or gap in an upcoming review, give the responsible party a heads up first with time built in for them to correct the gaps *before* the review. This advance warning is a great forcing function for getting the results you are after and is a superior, for-the-business alternative to letting someone lose face.

III. During the meeting, use process moves and structure to help your audience listen

Clarify your purpose (why/what).	Remind the group of the goals: what you are trying to accomplish substantively, why it matters, and your goals for the meeting. Just because you are "in the know" doesn't mean everyone else is.
Explain your guest list (who).	Make sure everyone understands who is in the room and why they are there (e.g., why they should care about your topic, what are you looking for them to add, what views are represented by other people, and what views might be missing or what open questions remain).
Lay out the process you are using or envision using for your project (how/timing).	Let the group know what kind of process you are following to achieve your anticipated outcome. For example, will this be one of a multi-part meeting series or something else?
	Let people know what has already happened. I don't know about you, but I find it frustrating when I'm invited to a meeting that is the fourth in a sequence, and no one tells me as much.
	Who else has been or will be consulted?
	What are the burning platform issues that must be addressed and in what time frame?
	What data and assumptions are you relying on?

> **Pro tip: remember, everyone has stakeholders. Establishing expectations and clarifying the process helps people manage their own stakeholders. One of the surest ways to make an enemy is to damage a person's relationship with their stakeholders. Avoid it at all costs!**

State your requests (asks, go do's, or calls to action).	Be clear in your own mind about what, if anything, you are asking for in terms of approvals, decisions, and resources.

	Don't miss the opportunity to communicate your ask before the meeting ends if that is appropriate and necessary for the work to progress.
Summarize your plan (decisions, action items, & deadlines).	Summarize decisions that have been made.
	Summarize action items and who owns them, along with deadlines.
	Summarize open issues, questions, and agenda items the group didn't get.
	Propose next steps.
Make your promise (follow-up, or what to expect from you).	What's next?
	What steps are you proposing to move forward?
	Who are you asking to take on those next steps?
	When will people hear from you (or someone else) again about this topic?

> **Pro tip: informing your audience of your plan and your promise is an act of respect. Honor their choice to commit their time to your meeting rather than to something else. This increases the chances that they will participate the next time you ask.**

Be aware of your pattern of speaking (e.g., are you rambling or losing the way?), and manage it using structure.	Signposting is a way to let your group know what kind of conversation you are intending to have (e.g., "this is a discussion to gather information; we won't be making a decision today").
	Signposting is also useful for guiding your audience through the agenda or timeline for the conversation (e.g., "we are going to spend the first half hour brainstorming, so let's table any discussion about execution until we hit 10:30am"). This helps to keep everyone on the same page and moving at the same speed (e.g., "we've been

having a brainstorming conversation, and now we need to move into a more action-oriented conversation where we start to narrow the possibilities").

Neglecting to signpost for your audience risks participants developing a different set of expectations about where you are in the meeting and what kind of conversation is going to take place.

Be considerate of your participants by steering clear of over-explaining and rambling. Providing clarity at the outset through your design and planning process helps reduce the tendency to ramble or digress.

Pro tip: an important part of successful leadership is cleaning your own mental house. In other words, prioritize.** You do not need to share _everything_ you know about a topic. Think about your answer to this question: what do I need to get out of this meeting? If certain facts would be redundant or are not necessary for supporting your goal, leave them out.

IV. Closing the meeting and afterward

Close the meeting.	As listed above, close the meeting by summarizing decisions, action items, and owners, the open issues that remain, and what will happen next.
Record notes and decisions.	For important meetings where significant points have been addressed and/or work has been accomplished, it can be helpful to circulate notes via email shortly after the meeting.

Pro tip: I often hear people complain that being the notetaker is demeaning. I have a different take. The meeting notes become the record of what happened and the starting place for the next steps. This is an important part of coordinating action.

Pursue next steps.	Be absolutely reliable in any follow-up you said you would take. Follow-up with action item owners. For more complex efforts, create a reporting process for progress updates. If things stall out, consider how your effort might benefit from bringing in more structure around accountability for how the work is (or is not) getting done. Communicate with your stakeholders. Keep them informed along the way. Don't forget this important step, and don't go dark. Take care of your stakeholders.

Pro tip: remember, your stakeholders have their own set of stakeholders to whom they are accountable. Don't leave your stakeholders hanging out to dry by forgetting to keep them in the loop.