

# Meeting Planning Mastery:

## 5 Steps Before the Agenda





## Step 1

# Start with the Purpose

Starting your meeting planning? First, define its purpose. Just as choosing a dish guides your ingredient list, understanding the reason for your meeting sets the stage and aligns everyone's expectations.

A well-defined purpose guides your meeting's flow, making sure it's tailored to what attendees actually need and care about. What is the primary reason you are meeting? What is the objective? Plus, being crystal clear on why you're gathering boosts motivation and points everyone in the right direction, right from the get-go.

### Common Types of Meeting Purposes:

- Affiliating
- Analyzing
- Celebrating
- Decision-Making
- Enrolling
- Information Sharing
- Brainstorming
- Mediating
- Status Updates & Planning
- Problem-Solving
- Team-Building
- Feedback Gathering

### Examples of a Meeting Purpose

- Acknowledge the accomplishments of the sales team.
- Schedule next month's work shift assignments.
- Deal with the conflict that has emerged between our two major suppliers.
- Determine changes to the next quarter's marketing budget
- Gather the newly formed team responsible for rolling out the new time-tracking platform to kick off the project.



## Step 2

# Who Should Attend?

Every meeting doesn't just happen in a vacuum—it's part of a bigger picture within your organization or team. This "context" can span from external pressures and internal challenges to shifts in the organization, team dynamics, and overarching goals. Equally important is nailing down the attendee list. The aim? Avoid the dread of realizing too late that key players were missing, prompting yet another meeting.

### Key Questions to Ask:

- How does this meeting fit into the overall organizational, departmental, committee plans or goals?
- How does this meeting relate to the last meeting and the next meeting?
- What organizational events/issues will significantly affect this meeting?
- How will this meeting affect events/activities elsewhere in the organization?

### Stakeholder Involvement (Who Should I invite?)

Is there a decision being made during your meeting? Is it something that will impact others? These are questions to ask yourself when deciding who the stakeholders are for this meeting. A stakeholder is a person who:

- Is responsible for the final decision
- Can implement the decision or block implementation
- Is likely to be affected by the outcome of the decision





### Step 3

## Build Your Desired Outcomes

Ever found yourself wondering mid-meeting, “What’s the point?” We’ve all been there, sitting through a presentation on last quarter’s numbers, questioning what to take away from it all. To move beyond this, whether it’s for a critical strategy session, your regular team catch-up, or a simple one-to-one, establishing clear desired outcomes is key.

Desired outcomes are the beacon that guides your meeting’s purpose, illuminating why the meeting is taking place (is it for sharing updates, troubleshooting, or settling differences?) and clarifying the ultimate goal or “take-home” for participants.

### Desired Outcomes

Desired Outcomes are usually: Brief, written statements, Specific and measurable, Written from the perspective of the participant, Nouns not verbs. They outline what you want to walk away with after the meeting.

### Examples:

- **An agreement** on the key problems with current invoicing system and a list of recommended solutions.
- **A decision** and action plan on how to reduce spending by 10%.
- **A better understanding** of the revised work schedule so that we ensure full coverage on the shift this week.
- **An agreed-upon list** of production goals for the week.

[Click here to learn more about purpose & desired outcomes and full examples that will help you build your own.](#)



## Step 4

# What's the Decision-Making Process?

When decisions need to be made, chances are that there will be a meeting about it. But, meetings tend to go off the rails when decisions need to be made. This is because the decision-making method is not clear.

A decision-making method is a framework and shared language that guides your decision and how others will be involved. There are several distinct decision-making methods, each with advantages and disadvantages.

## Levels of Involvement

### Decide & Announce

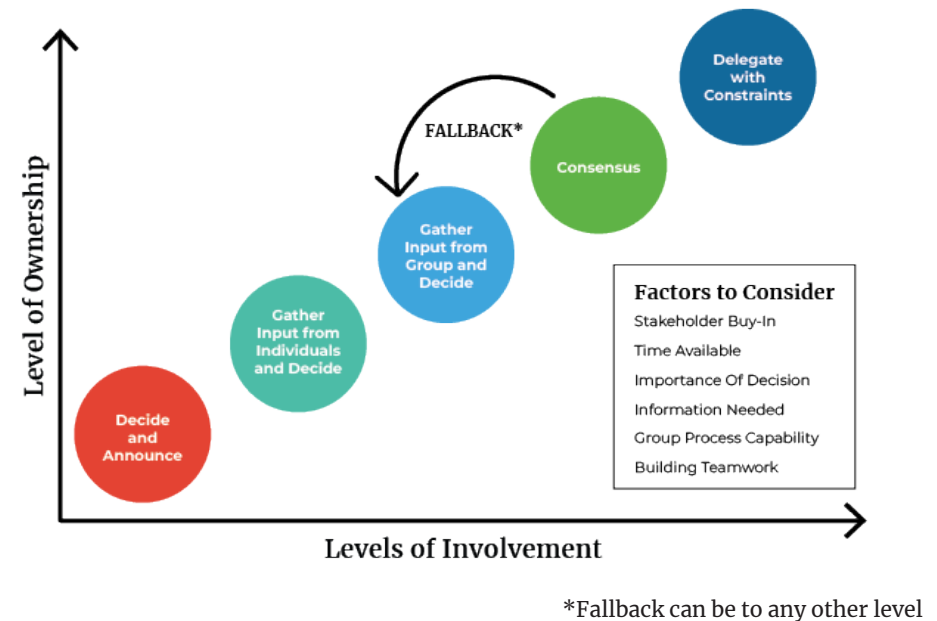
The leader makes a decision with little or no input, then announces the decision to those who will be affected by, or must carry out, the decision.

### Gather Input from Individuals & Decide

The leader asks selected individuals for input (ideas, suggestions, information). The leader then makes a decision.

### Gather Input from the Team and Decide

The Leader asks the team members to share their ideas in a meeting. The leader decides after hearing from the team.



### Consensus

A consensus decision is one that every member of the team understands, supports, and is willing to help implement. All key stakeholders have had an opportunity to give their opinion and understand the implications of various options. All members, including the leader, have the same formal power to support or block proposals. If consensus cannot be reached, the leader has a fallback decision-making option.

### Delegate Decision with Constraints

The leader defines the decision that needs to be made in the form of a question(s), clarifies the constraints on the decision (e.g., budget, timeframe, quality requirements), and delegates the decision to others. The leader does not alter the decision as long as it adheres to the constraints.

## Step 5

# Assign Meeting Roles

A common oversight among meeting leaders is forgetting to distribute meeting roles, often trying to juggle them all single-handedly. Remember, you're only one person, and spreading the responsibilities can significantly enhance the success of your meeting.

Bonus: giving participants a specific role tends to boost their engagement and fosters a sense of inclusion.

Not every gathering needs the full spectrum of roles, especially in more intimate settings like a one-on-one, where it's impractical to assign multiple roles. In such cases, a simple "I'll take notes" might suffice. So, apply your judgment to decide which roles are essential for the efficiency and effectiveness of your meeting.

## Meeting Roles

### Facilitator

The Facilitator is responsible for moving the meeting along. They will check for understanding, build agreements, and keep people focused and engaged. It's useful to have a separate neutral person if the meeting leader has a lot of content expertise or in high-stakes situations.

### Meeting Leader

The leader provides helpful context, encouragement, sets clear direction, participants in making decisions, and makes final decisions, if necessary.



### Scribe

The scribe is responsible for keeping track of information, key insights, agreements, action items, and parking lot items.

### Timekeeper

The time keeper will use the agenda and any instructions from the facilitator to keep the group on time. They will provide time checks when necessary to keep items on schedule.

### Producer

The producer is responsible for managing online meeting technology, including explaining how to use platform features and resolving tech issues.

### Meeting Participant

Participants are responsible for staying focused, engaged, and contributing to ideas and suggestions.



## Step 6

# What's Next??

You're now ready to start building your agenda. This agenda will be your roadmap to success for your meeting. Make sure you send it out in advance so those involved will have a full understanding of what will be covered and what's expected of them during your time together.

**You can download our meeting agenda template here which includes a step-by-step video on how to complete it. >**

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### Step 3

## Make Sure the Right People are in the Room

How many meetings have you been a part of where you were halfway through and looked around the room (virtual or in-person) and wondered to yourself “why am I here?”

This is a result of a meeting leader not thinking through who needs to be in the room. They tend to lean on two extremes: playing it “safe” and inviting anyone that may have a thought on the given topic or leave out people crucial to the topic which tends to end up resulting in another meeting being scheduled.

How can you as a meeting leader avoid this?

### Stakeholder Involvement

Is there a decision being made during your meeting? Is it something that will impact others? If so, the first thing to consider is who are the key stakeholders in the topic being discussed in your meeting? A stakeholder is a person who:

- Is responsible for the final decision
- Can implement the decision or block implementation
- Is likely to be affected by the outcome of the decision

It's also a good idea to seek the involvement of subject matter experts. They can provide relevant information and data-based advice. Consider including difficult or contrary stakeholders. Better to get concerns up front than be resisted during implementation.

