Effective Meeting Skills:

A Team Exercise in Planning & Practicing

Meeting Agenda Template

Project / Team / Department:

Meeting Title:

Date:

Location:

Attendees:

Purpose: (What do you hope to get out of this meeting? Ex. present and discuss an idea, make a decision, complete a deliverable, etc. If your meeting doesn't have a specific purpose, chances are you don't need a meeting!)

Roles: (If possible, decide on roles prior to the meeting. Otherwise, assign at the beginning. You can use the roles below or come up with your own based on your group's needs. Try to take on a different role each time!)

Facilitator:

Timekeeper:

Note-taker:

Participant(s):

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Agenda:

    I.   Check-In

    II.   Topic / Question 1

    III.   Topic / Question 2

    IV.   Topic / Question 3

    V.   Other Business (This is useful to include, as those who didn't create the agenda might have other items to bring to the table.)

Next Steps and Action Items:

(These items have been agreed upon during the meeting for follow-up.)

	Action Item	Person Responsible	Due Date
1			
2			
3			

Quick Reminders

AGENDAS

A meeting agenda is a simple tool that can make a world of difference. An agenda outlines what will be discussed during a meeting to make sure that all points are covered during the time your group is together. A few key points about creating an agenda:

- **It should include your meeting's purpose.** Do you need to present and discuss an idea? Make a decision? Do some kind of practical work together? If your meeting doesn't have a specific purpose, chances are you don't need a meeting!

- **Build your agenda together.** Use a shared document and allow everyone to contribute to the agenda.

- Most agendas list topics to discuss during the meeting. This is fine, but if you can, **use questions instead of topics.** That way, you'll know the meeting is complete when all the questions are answered!

ROLES

There are different roles to play in a meeting (ex. facilitator, timekeeper, note-taker, participant). You may choose to fill the same role every time or, ideally, **rotate the roles** so people can try out new behaviours. Roles help ensure that everyone is an active participant in the meeting!

NOTES

Meeting notes are not a transcript of the meeting; rather, they are a summary of what was discussed and what decisions were made. In project teams, meeting notes are useful to track how and why decisions were made and as a reference during times of conflict or stress!

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Process Questions

If you find your meetings are not effective or your group feels stuck, try asking some of these questions:

- Are our meetings serving the task?

- Is the way we're conducting our meetings helping the team to be effective?

- What aspects of our meetings aren't working?

- How is the pace, flow, and tone of the meetings?

- What might we do differently?

    o What should we do that we aren't yet doing?

    o What should we do more of? Less of?

    o What should we continue as is?

- How well do we stay on topic?

- Do we look for problems in our **process** rather than blame each other?

- How well do we discuss the information?

- How well do we respond to each other's questions?

    o Are we satisfied with the responses provided?

- Any other comments, observations, recommendations?