

➤ Process for Running Effective Meetings (with Meeting Record Sheet)

A defined method for running meetings is a vital project management tool. It standardizes the meeting process, minimizes waste, and promotes the effective execution of critical meeting tasks.

Using the Process for Running Effective Meetings tool has a number of benefits:

- It helps keep teams on track.
- It minimizes wasted time and effort in meetings.
- It improves the probability that meetings will be accelerators of the improvement process, rather than slowing it down.
- It promotes clarity and agreement on key tasks to be achieved.
- It provides an historical record of the meeting, decisions, outcomes, assignments, accountabilities, and next steps.

This tool contains:

- ▢ Directions for the Process for Running Effective Meetings
- ▢ Meeting Record Sheet



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Directions

1. Clarify the objectives of the meeting and ensure that everyone understands the objectives.
2. Keep a running attendance sheet from meeting to meeting.
3. Review the meeting roles. Review who will be timekeeper, recorder, leader, and facilitator. Decide at what intervals the timekeeper will give feedback about time.
4. Review the agenda and ensure that all team members understand the agenda items. Address any issues of confusion or lack of agreement.
5. Work through the agenda items.
6. Write as much of the meeting issues, decisions, plans, and next steps on a flip chart so that all team members can help with real-time correction of any errors or omissions.
7. Review the information on the flip charts. For each agenda item, record only the summary of discussion, key decisions and next steps, assignments, and due dates on the attached Meeting Record Sheet.
8. Plan the agenda for the next meeting. Decide on objectives and goals for the next meeting, and who will do what in preparation for that meeting.
9. Evaluate the meeting. What did the team do well that it should continue doing? What should the team do differently to improve future meetings?
10. Obtain approval of the completed Meeting Record Sheet (if necessary) and disseminate as soon as possible after the meeting.



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Meeting Record Sheet

Project Name: _____ **Location:** _____ **Date/Time:** _____

Team Members (indicate members attending this meeting):

_____ _____ _____ _____ _____
 _____ _____ _____ _____ _____
 _____ _____ _____ _____ _____

Agenda Item	Summary of Discussion	Decision / Next Steps	Person Responsible / Due Date