FELIX HALLER

MEETING SUCCESS HABITS

Seven Habits to Facilitate Effective Meetings

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SEVEN HABITS TO FACILITATE EFFECTIVE MEETINGS

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Introduction

Most Meetings Are Ineffective

Business professionals aren't happy with meetings, and you have probably picked up this book because you feel the same. They perceive most meetings as inefficient and a waste of valuable time. In fact, a Udemy study found that six out of ten US workers think that business meetings are simply another distraction from work.[1] In another survey by Korn Ferry, more than two-thirds of US workers said that spending too much time in meetings distracts them from making an impact at work.[1]

The problem is that most meetings are ineffective. In the same Udemy study, more than half of office workers stated that small talk and office gossip are the biggest distractions and reasons for unproductive meetings, followed by late arrivals and early departures, off-topic discussions, and technology problems.[2] Even executives have similar complaints. According to research by executive coach Rick Gilbert, executives consider more than 60 percent of business meetings to be failures. That is stunning.[3]

Meeting effectiveness hasn't exactly improved with the emergence of working from home due to the COVID-19 pandemic. Microsoft's 2020 study found that the shift to remote work has resulted in even more meetings with more attendees. Also, the average meeting duration has jumped by 10 percent due to a significant increase in the number of shorter meetings. Microsoft's analysis shows that while longer 60-minute meetings have decreased by around 10 percent, shorter ones have increased significantly by more than 20 percent.[4]

All of this results in wasted time and costs. For example, the software company, Atlassian, believes that half of all meetings waste time, resulting in $37 billion in wasted salaries.[5] The *Harvard Business Review* has also observed the amount of time wasted by meetings and even created a meeting cost calculator to help organizations determine their wasted time and costs.[6]

Learn Effective Facilitation from a Practitioner

Like most business professionals, I have a love-hate relationship with meetings. Collaborating as a team and working toward a common goal can be exhilarating, but the required meetings are often draining and ineffective.

Over the last six years, I have worked as a management consultant at Bain & Company, one of the top global strategy consultancies.[12] Over time, I have facilitated hundreds of meetings with clients at Fortune 500 companies and have experienced all kinds of meetings ranging from excellent to mediocre, and even some bad ones. Fortunately, as a manager, I also had the privilege of learning from high-performing business leaders and experts to become an effective meeting facilitator.

Based on my experiences and other thought leaders' advice, this book aims to share time-tested tactics that management consultants and business leaders use to run effective and efficient meetings. While there are hundreds of books and resources on meeting facilitation, most of them are theoretical, long-winded, and somewhat misleading. This book is not about theory; instead, it focuses unapologetically on practical advice that will make you a better meeting facilitator.

The tactics recommended in this book are my personal thoughts and opinions that I apply when facilitating meetings. Nevertheless, running meetings is not a science, and people have different styles. I encourage you to read this book, reflect on my principles and tactics, and apply what you think is most valuable to you. Are these tactics exhaustive, covering everything you can do to improve your facilitation? No. You might even disagree with some of them. If you do, please let me know.

Practical Advice Focused on Day-to-Day Meetings

This book is concise and practical, focusing on the most crucial tactics that will instantly improve your meetings. It targets young professionals who haven’t had the opportunity to hone their facilitation skills by emulating effective supervisors or colleagues.

In other words, this is not a know-all, tell-all book. It covers just the most critical advice in as few pages as possible. I won’t waste your time with convoluted introductions, the pros and cons of different tactics, and multiple case studies. Instead, you will learn real-world advice that you can apply instantly, such as creating a specific meeting plan, keeping the discussion focused, and sharing clear meeting notes.

While there are many types of meetings, this book focuses on small day-to-day business meetings. The *Harvard Business Review* classifies meetings based on the number of attendees. An assembly comprises over 100 attendees, a council includes 40 to 50 attendees, and a committee has less than ten attendees. For this book's purposes, we will focus on committees because they are the most common and critical type of meetings in today's business environment. In these meetings, a facilitator tends to inform or guide a discussion with a specific purpose, such as reviewing the latest project status, discussing new sales initiatives, or making hiring decisions.[7]

This book is organized into seven sections, each covering a habit used by high-performing meeting facilitators:

1. Clarify the purpose
2. Create an agenda
3. Share the logistics
4. Start and end on time

5. Facilitate the discussion
6. Note decisions and action items
7. Follow up

You can apply these seven habits sequentially for your next meeting. The first three tactics focus on meeting preparation, ensuring the objectives are clear, and making attendees aware of the specific agenda items and logistics. The next three tactics cover meeting management, including how to kick off the meeting, facilitate an engaged discussion, and take concise meeting notes. Lastly, tactic seven covers how to follow up after a meeting and ensure people complete their assigned action items.

#1

Clarify the Purpose

"You have a meeting to make a decision,
not to decide on the question."
—Bill Gates

Be Clear about the Purpose

Meetings should serve a purpose. Therefore, every business get-together needs clear goals and objectives that the facilitator and attendees are trying to accomplish. Business meetings are not social gatherings or unstructured discussions; facilitators schedule them to achieve something. Be clear on what that something is.

I have seen countless examples of managers scheduling meetings to talk about a broad or generic topic. During the meeting, the attendees share their thoughts and opinions without any connection to a specific objective. At the end, someone will inevitably suggest another meeting to "continue the conversation" without making any decisions or planning their next steps.

The challenge is that meetings are often associated with the topics they cover (such as product strategy, compensation review, or inventory management processes). However, we rarely go further and detail what exactly we are trying to accomplish during that time together.

For instance, what is the specific objective for our next product strategy meeting? We could share the latest customer survey results to inform our next product launch. We could brainstorm initiatives to increase profitability or decide on our product launch roadmap for the next three years. In other words, what are the specific objectives we are trying to achieve in the meeting?

In summary, a meeting where the objectives are blurred, unclear, or generic will often lead to an ineffective outcome and frustrated attendees. And worst of all, it will leave a poor impression on the host and facilitator.

Understand the Type of Meeting

A practical approach to clarifying a meeting's purpose is to define whether the primary goal is to inform, discuss, or decide. Almost every meeting objective can fit within one of these three categories.

Information Sharing

Sharing information and ensuring key stakeholders are aligned and informed is an integral part of today's business world. Information-sharing meetings are common and are characterized by one-way communication from the facilitator to the group, with minimal discussion and interaction. These meetings could include a company-wide town hall presentation, updating a committee on the current status of a project, or onboarding new employees.

Discussion

Discussion meetings ensure that decision-makers receive input from people with the right knowledge and expertise. In these meetings, attendees have an active dialogue and will identify options and trade-offs for the decision-maker to consider. However, this doesn't mean that the decision-maker must consider every discussed option; they alone will make and own the final decision.

A good example is how Netflix requires decision-makers to solicit input from the broader organization before moving forward. If a leader wants to embark on a new idea, he must first request feedback across the Netflix organization. Leaders share their project ideas publicly within the organization, and every employee can comment on the project in a shared document for the decision-maker to read and consider. The decision-maker does not have to go with the consensus recommendation, but he must ask for feedback as part of the process.

For discussion meetings, smaller groups are more effective than bigger ones. If the required list of voices is extensive (more than twenty), consider splitting into smaller breakout groups or asking attendees to write their feedback in a shared document.

Decision

Great businesses and leaders are focused on making effective decisions. They know that the ultimate goal of meetings and presentations is to make decisions to improve the business. To this end, successful decision meetings specify the decision to be made and have the critical decision-makers in the room. (If the key decision-makers cannot attend, it is best to postpone or repurpose the meeting.)

Typically, group discussions or information-sharing sessions precede decision meetings. The ultimate goal is to make the best possible decision, and for that, decision-makers need to be aware of possible options, trade-offs, and implications.

Also, decisions lead to actions and next steps. Therefore, effective organizations make sure to assign an owner to each decision for implementation.

Specify the Meeting Objectives

In an effective meeting, everybody knows the purpose and objectives at hand. For every meeting, the hosts should clarify whether they want to inform, discuss, or decide.

The more specific the objective, the better. For instance, “project status” is a typical but generic objective; a more precise and useful goal would be, “discuss workstreams at risk and decide on mitigating actions.” A popular framework for meeting objectives is the SMART model, making each goal **s**pecific, **m**easurable, **a**chievable, **r**ealistic, and **t**imely.

In general, a more formal meeting should have more specific objectives. However, even in internal meetings, facilitators should be specific about what they are trying to achieve and where they need input.

I have seen this play out most notably with young professionals who share a forty-slide presentation or a complex Excel model for feedback from their supervisors. A more effective approach would be to mention the specific areas where you need input, where you would like to discuss something, and where you want your supervisor to make a decision.

A useful tactic is to start every meeting with a purpose statement. For example, the University of California insists that facilitators begin every session with the following message: “The purpose of this meeting is to inform you about X, to discuss Y, and to decide on Z," where X, Y, and Z are specific objectives.[13]

#2

Create an Agenda

"Spontaneity within a plan is better than spontaneity as a plan."
—Anonymous

Always Have a Meeting Agenda

The key to successful meeting management is preparation, and every meeting needs to have an agenda. It is not surprising that well-planned meetings are the main reason people get excited about going to one.[8] An agenda lists the order in which each item will be discussed, and it is arguably the most crucial element of a successful meeting for a few reasons.

First, an agenda clarifies expectations and allows others to prepare for the meeting. The best meetings occur when everybody knows what to expect, agrees with the discussion topics, and joins at the right times. For instance, attendees might need to bring discussion data or pre-read the materials you shared. And if someone can't attend the full meeting, they will have a general idea of what they will miss and can reach out to a colleague for a targeted update.

Second, having an agenda increases focus and avoids wasting time. Meetings don't always go according to plan, and an agenda can help keep everyone on track. A discussion might go longer than expected, the participants may go off-topic, or someone might join late and disrupt the flow. In these situations, having a plan allows the attendees and the facilitator to focus on specific discussions at the right time. During the meeting, the facilitator needs to ensure that the debates focus on achieving the objectives, and participants need to focus on providing relevant and valuable thoughts.

Third, an agenda reflects positively on your leadership and management skills. If participants notice that you have a reasonable plan for a meeting, they will assume that you know what you are doing and perceive you as an effective facilitator. Perception matters, and if attendees see you as a credible facilitator, they will challenge you less and be more inclined to give you the benefit of the doubt if a meeting doesn't go according to plan. These are all factors that will make your sessions more successful.

List Specific Agenda Items

While creating a meeting agenda may sound straightforward, there are a few considerations to draft a compelling and useful plan that will enable you to run a successful meeting.

First, keep it simple. Start with a list of bullet points representing each meeting objective. Typically, you will have three to five agenda items for a forty-five-minute meeting. If you need to achieve more than a few goals, combine them into categories to make them more digestible, or schedule a separate appointment. It is also helpful to specify the allocated time and owners for each action item (for instance, “Discuss customer centricity initiatives to grow sales in Florida – Steve, 30 minutes”).

When listing the meeting outcomes, avoid one-word descriptions or agenda items that lack specificity. For instance, listing “sales effectiveness,” “integration project,” and “staffing” as your agenda items is not very informative since attendees won’t know what the objective is and what they should do in the meeting. Do I need to prepare for a specific discussion? Will someone give us an update for informational purposes, or am I expected to make a decision? There are a lot of questions left unanswered. A better approach is to write a full sentence specifying what the meeting host is trying to achieve within each agenda item. For instance, “Discuss short-listed initiatives to increase sales in the next quarter," or "Inform the board of the current integration project status." A good tactic is to start with a verb, which forces you to create action-oriented and specific outcomes.

Also, be deliberate about the timing and prioritization of your agenda items. Not every topic will require the same amount of time. For instance, in a sixty-minute meeting, you might have three agenda items, with one expecting to take thirty minutes and the other two requiring just fifteen minutes each. You likely won't know the exact time each item will take, but it is better to have a plan than to go in without any framework for timing.

As you plan your agenda, also think about the prioritization or order of your goals. A popular and practical approach is to rank your objectives by importance, meaning you start with the most critical subject. However, there are some exceptions. For instance, if you know that a crucial participant can only attend at the end of a meeting or if an agenda item needs to be discussed first to inform another, you will need to adjust the schedule accordingly.

#3

Share the Logistics

"A good process produces good results."

—Nick Saban

Suggest a Meeting Time and Alternatives

When scheduling a meeting, always be the one to suggest the time. Many colleagues try to schedule a meeting by being vague and flexible, but this approach is often ineffective. For example, if you ask your recipient for their availability, they might respond with, "I am quite flexible on Tuesday and Wednesday." Afterward, you go back and forth a couple of times until you finally find a time slot that works for both of you. This scheduling approach is common but inefficient.

Instead, avoid the back-and-forth by always suggesting an exact time and day, even if you don’t know the other person’s availability. By proposing a time, you put a line in the sand, and your recipient only needs to check her availability and quickly respond with yes or no. The recommended time will also serve as the default option, resulting in a higher burden on saying no. As a result, your meeting participant will be more inclined to accommodate the time, even if it requires rescheduling other appointments.

In addition to suggesting a specific time, also share two to three alternatives in case the preferred option doesn’t work. That way, you increase the chance that your busy colleague will respond favorably to one of your suggested times. Ideally, you can also view the other person’s availability in your organization’s calendar application. In that case, compare your availability with theirs and suggest a few times when you are both free.

In general, keep the asks and attendees to a minimum. Don't discuss the time and details of the meeting in the same correspondence. Find a time first, then work out the details. And don't try to accommodate your meeting for every attendee. Decide on the two to three critical people and make sure they can attend the suggested time.

Send a Meeting Invite to All Attendees

Every business meeting needs to have an invite sent by the facilitator stating the time and duration, the purpose, the attendees, and the specific objectives. Luckily, this is already fairly standard in most business organizations, but it is worth reiterating since it creates friction and annoyance if the host doesn't follow these guidelines.

Once you know the date and time of the meeting, send an invite via your company's calendar software (such as Microsoft Outlook) or use an external tool such as Calendly.

Don’t leave it to the attendees to block the time in their calendars. Having one single calendar entry sent by the facilitator is table stakes for effective meeting management. If the meeting time changes, you can easily update the invite, and all attendees will be notified instantly. Also, using a shared calendar will prevent busy attendees from forgetting about your meeting. By sending an invite, the meeting automatically gets added to their calendar, and they will need to proactively decline or delete it if they don’t think they can attend.

The earlier you can send the meeting invite, the better. Sending it in advance helps manage expectations and gives your audience enough time to make sure they can attend the meeting and prepare for it.

Share Materials at Least Twenty-Four Hours in Advance

Most of today's meetings have supporting materials, such as a PowerPoint presentation to guide the discussions and provide supporting information. Whenever you have materials, it is best to share them with the attendees at least twenty-four hours before the meeting to give them enough time to plan and prepare. Also, mention what you expect the participants to do in advance of the meeting. Are the materials just for information, do you expect people to read the materials in detail, or do you want somebody to bring data to the meeting?

For critical and controversial meetings, prewiring your materials with crucial audience members is also recommended. Prewires are meetings or discussions with a few select individuals before the meeting to learn where they stand, identify their objections, and get additional ideas to improve your approach and materials. If possible, engage your key audience members one to two weeks before your actual meeting by sharing a draft version of your materials. That way, you can incorporate their feedback into the materials and get their buy-in.

#4

Start and End on Time

"A man who dares to waste one hour of time has not discovered the value of life."
—Charles Darwin

Start Every Meeting on Time

Attendees hate it when meetings start late and, unfortunately, most do, which leads to crushed morale and annoyed attendees. A study found that nearly 40 percent of business meetings start late.[9] When this happens, the facilitator is indirectly telling the on-time attendees that he is not valuing their time. Also, starting late wastes everyone's time. For instance, meetings scheduled to last for thirty minutes are shortened to only twenty to twenty-five minutes because people join late and have side conversations.

To prevent this common pitfall, make sure to ask beforehand if anyone cannot attend or will be joining late. Get a confirmation from critical attendees, either personally or through their assistants. Once the attendees show up, start the meeting right away. In most cases, not everybody is essential, and it is generally better to start the session and give a recap afterward for anyone who dials in late.

Even better, start every meeting at the scheduled time to set an example and create a meeting culture that respects the start time. Obviously, this only works if you are a senior and respected person in the organization; as a young professional, this would likely backfire.

Provide Context and Introduce the Objectives

Your attendees are busy, and they might not have prepared for the meeting in advance. With this being the case, it helps start the meeting by providing the context, sharing the purpose, introducing the agenda and objectives, and telling the attendees what they will need to do.

Depending on the situation, you could also ask the participants if they agree with the plan and whether there is anything else they want to cover. Asking for feedback on the objectives can help to get buy-in from the group, especially when you are confident they will agree with the plan.

Be quick with this introduction. In a sixty-minute meeting, avoid spending more than five minutes on the context, purpose, and meeting agenda. Also, consider your audience's familiarity with the topic. If they are familiar with the context, you could jump into the first discussion topic right away.

End the Meeting with Next Steps

Similar to starting on time, ending the meeting on time is also crucial. Prolonged meetings annoy attendees and leave a negative impression on the facilitator. Your attendees have busy schedules and places to be.

Announce at least five minutes before the end that the meeting will conclude soon, and explain how you suggest using the last few minutes. If you realize that you won't accomplish everything by the end of the scheduled time, assess your options. Don't let the meeting linger; instead, suggest what to do next.

The first option is to extend the meeting by asking the participants if they have more time. If the critical attendees don't have time, don't extend the meeting. Prolonging the session is a common approach, but in most cases, five to ten minutes isn't enough to complete the objective, and the meeting will end on a low.

A more effective approach is to accept that the meeting must come to an end and suggest spending the remainder of the session wrapping up. Wrapping up can include recapping the accomplishments, reviewing critical decisions, and specifying who will do what by when. In general, you want to end each meeting with a recap of the takeaways and follow up with an email summary. Also, scheduling a follow-up meeting is useful if a few topics are outstanding at the end of the session.

#5

Facilitate the Discussion

"Great things in business are never done by one person; they're done by a team of people."

—Steve Jobs

Ensure Focus but Don't Control the Discussion

You have appropriately prepared for the meeting, everyone knows the objectives, and you've started on time. During the session, the facilitator's job is now to ensure that the conversation and comments are focused, and the meeting objectives get accomplished.

Once it is clear what you want to achieve in the meeting, it is time to let others talk. If you share your thoughts first, you will likely see nodding heads, and people might be afraid to speak, depending on your seniority or clout. The point of a meeting is to have a productive discussion that can surface different ideas and opinions. If you don't want to hear people's thoughts, why even bother having a meeting?

As the facilitator, your job is to be "right" at the end of the session, not at the beginning. You are tasked with clarifying the objectives and ensuring that the group achieves a good outcome, but it doesn't have to play out precisely as you intended.

A significant challenge in leading a group of people is getting them to focus. It is not uncommon for some attendees or groups to go off-topic and have discussions that are not relevant to the subject at hand, which can happen intentionally or unintentionally. People sometimes join meetings unprepared, have their own agendas, or have difficulty staying focused on one topic for an extended period. You don't want your meetings to become disorganized or known for wasting time due to lack of focus.

As the facilitator or project leader, you are responsible for keeping the conversations targeted to the objectives. Most attendees don't think about the goals during the meeting but will instead focus on the conversation and say whatever comes to mind. Therefore, the facilitator needs to continuously "read the room" to ensure that the meeting objectives are accomplished. Also, in case of lengthy and derailing conversations, it is sometimes useful to "park" a topic and move on. In summary, the facilitator controls the meeting but not the conversation.

Make Everyone Contribute

Meetings can derail and get off-topic in a variety of ways. A few people might dominate the conversation. Some people may volunteer ideas, while others only offer criticism.

People might be reluctant to share opinions outside of their department or beyond their area of expertise.

In any case, these situations result in suboptimal discussions and a lost opportunity to get the best ideas and make the most effective decisions. The solution is to create psychological safety within the group of participants, which Google found to be one of the top factors of effective teams and meetings.[10] “Psychological safety” means team members feel safe to be vulnerable with each other and take risks, resulting in an open and encouraging atmosphere for people to share their opinions. On the other hand, a lack of psychological safety might lead to one person dominating the conversation, and other attendees reluctant to speak up and contribute. There are a few practical tactics to create psychological safety.

First, if you already know that you might encounter a suboptimal group dynamic and some attendees are likely to derail the conversation, prewire them. For instance, if you have a senior and respected person attend a meeting, tell them to hold off voicing their opinions at the beginning of the meeting. That way, people can share their thoughts first before hearing and “agreeing” with the senior person’s views. People tend to avoid disagreeing with more senior members.

Second, allow yourself to be vulnerable. By showing vulnerability, attendees will perceive you as trustworthy and will be more willing to open up. For instance, you could open a discussion with, “I don’t know what the best path forward is on this topic and would like to get everybody’s opinion,” or “I was wrong with my initial assessment; please help me understand this.” Being vulnerable can be very powerful, especially coming from a more senior person.

Third, if the group will stay together for a long meeting, such as a strategy or idea-generation workshop that might last for a couple of hours, start with an icebreaker or inclusion exercise. These build trust among the group and result in people opening up to each other. For instance, have each attendee draw one picture of what they want to get out of the meeting and another of something personal that gives them energy. After two minutes, everyone can present and explain their drawings. Doing an icebreaker might sound risky and could be seen as unprofessional, but the opposite is true. Time and time again, icebreaker participants open up, smile, and become more personable and vulnerable, resulting in significantly better working relationships, more engaging discussions, and more thoughtful disagreements.

Fourth, if you notice that some people are dominating a meeting, and a few attendees are not contributing at all, call out people from time to time. For instance, say, “Hey, John, I believe you have already thought about customer research; what are your thoughts on how to improve the survey?”

Fifth, use democratic methods to ensure everybody shares their opinions. For example, when prioritizing a long list of ideas, give every attendee three votes to select their personal favorites. Visualizing all the votes on a flip chart or other tool ensures that you capture everyone’s opinions. Similar to the first approach, have the most senior person vote last or not vote at all. In general, it is best for the decision-maker not to participate in any voting or idea-generation but to instead listen to the group’s input and then make a decision afterward.

#6

Note Decisions and Action Items

"Whenever you see a successful business, someone once made a courageous decision."

—Peter F. Drucker

Take Notes During the Meeting

Meetings are not one-off events where people come together, discuss something, and then never again think about the discussed topics. Almost all business meetings are part of a project or ongoing activities and will lead to follow-up actions. Having a written record of the meeting's outcomes is the easiest way to ensure a group's alignment on the next steps and a focus on the longer-term business objectives.

Detailed notes serve as a single source of truth of the meeting's discussion. Conversations can be ambiguous, and attendees might have differing recollections of what was said. Therefore, someone needs to make sure to capture critical outcomes. Did we approve next year's budget? What were the next steps we agreed on? Did John or Alice want to provide additional input to the questionnaire? Also, meeting notes enable the facilitator to send a follow-up email and share the outcomes with other colleagues.

If possible, the notetaker should be someone other than the facilitator. Especially in more critical and complex meetings, a facilitator can't take detailed notes while also fully participating in the discussion.

Focus on Decisions and Action Items

Meeting minutes can vary in their level of detail, depending on the meeting's nature and the company culture. Detailed notes, including verbatims, are appropriate for critical meetings with senior people. Otherwise, meeting notes can (and should) be as short as possible, containing only the key takeaways as a list of bullet points.

The most important takeaways from a meeting are action-oriented decisions and next steps that will ultimately lead to business results. Not everything in a meeting is worth capturing. If a comment or thought doesn't lead to decisions or next steps, it shouldn't be part of the written meeting summary. Therefore, I recommend structuring meeting notes into two simple sections: decisions and action items.

Impactful individuals know that effective decision-making is what matters most and what differentiates organizations. They are focused on making effective decisions to improve the business. For instance, “What initiatives should we pursue to win more customers?” “What decisions can help us retain top talent?” With this being the case, every time somebody makes an important decision, the notetaker should include it in the meeting notes. Optimally, a senior person will support or make the final decision; otherwise, people won’t implement it. As discussed, not every meeting will be intended to make a decision. A meeting’s goal might be to inform somebody or to brainstorm something. In that case, you might not have many decisions to write down, and you can repurpose the decision section for accomplishments or takeaways.

The other critical section is action items, where one will list the next steps discussed in the meeting. Everybody must know what they need to do next to accomplish a project’s overall objectives. For instance, you might present your competitive research, and as a result, the group decides that it should be shared with the head of the Sales Department for approval. Therefore, the action item could be, "Present competitive insights to the Sales Department head for approval – John."

Specify Action Items, Owners, and Deadlines

While it is essential to have a broad understanding of the meeting outcomes, the most critical takeaway is that everybody knows what they need to do next. If people are confused about the next steps, that's usually a sign that the meeting was a failure. Thus, next steps or action items are the most critical elements of meeting notes and the follow-up email.

Tactically, write down the action items during the meeting as they are discussed and recap them at the end. Also, assign an explicit owner to each action item. When talking about an action item, make sure that someone owns it right away. For instance, say, "Okay, we agree that someone should follow up with John from Legal. Who will own this action, and by when?"

Don't assume that someone will proactively complete a task without being assigned. When someone says, "We should do X," "It would be nice if we could do Y," or "Team A, please do Z," chances are, if it is not crystal clear who will own the task, nobody will do it. Ownership and accountability are critical and necessary for effective delegation.

Unless an activity is ongoing, always include a due date, even if it is a made-up deadline. This approach sets expectations and keeps everybody productive. Also, it enables you to send a follow-up email sometime before or after the deadline has passed.

#7

Follow Up

"Success comes from taking the initiative
and following up."
—Tony Robbins

Share a Summary After the Meeting

Being confused and unclear about the accomplishments and next steps is the worst outcome of any meeting and will make the endeavor feel like a waste of time. On the contrary, the best meeting outcome doesn't always mean everybody is happy, but it requires a clear set of aligned decisions and actions.

Therefore, the last step in the "life cycle" of a meeting, after appropriate preparation, effective facilitation, and note-taking, is to distribute a summary to the meeting participants detailing the key accomplishments and next steps.

The most pragmatic way to do this is by cleaning the meeting notes and sending an email with a bulleted list of decisions and action items. Depending on the type of meeting and company culture, the meeting summary could include detailed notes. For instance, for more formal meetings, such as a board update, sharing detailed notes is recommended.

Although email is the most practical way to distribute the meeting summary, innovative collaboration tools such as Slack, Microsoft OneNote, and Microsoft Teams are becoming more popular for sharing synopses and notes.

Sending a meeting summary ensures alignment and transparency. In the best case, everybody will agree with the meeting outcomes during the meeting. Still, in reality, it is not uncommon to have a few topics that are unclear to some participants or to have people coming away with very different interpretations of the discussion. Did we decide on the color of our new product since most of us liked it? Was John’s support of next week’s marketing survey launch a decision or just a recommendation? Therefore, a meeting summary serves as a single source of truth about the meeting outcomes. If someone disagrees with the interpretation of a decision or an action, they can reply to the email and clarify their thinking.

Meeting summaries also ensure accountability and ownership. Attendees bring their own motives to meetings, and a “yes” can turn into a “maybe” over time. By clearly stating who owns which action and by when they need to complete it, a summary will clarify responsibilities because, without accountability, nothing gets done.

Alfred P. Sloan, who ran GM in the mid-1900s, knew the power of sharing meeting memos. During a meeting, he would remain mostly silent while he took notes. After the meeting, he would send a message to all participants that outlined decisions, action items, and deadlines.[11]

Share the Notes as Soon as Possible

Sharing the meeting summary is best done as soon as possible, at least within twenty-four hours but ideally within one to two hours after the meeting. Promptly distributing the summary is beneficial for a few reasons.

First, the meeting is still top of mind for everybody. When sending a follow-up email a couple of days later, the recipients might have forgotten most of the discussions, decisions, and next steps. In today’s business world, people are frequently in meetings. The sooner attendees can receive the summary, the more likely they will remember the discussions and provide additional commentary and clarifications.

Second, the earlier you send it, the less your recipients expect. Especially for informal meetings, it is best to send the follow-up email within thirty to sixty minutes after the meeting. That way, the recipients won't expect a well-written and thought-out email. It is a rough and quick summary of the discussion; nothing more and nothing less.

However, there are exceptions. The more formal and critical the meeting, the more time you have to send it. For instance, if the meeting memo serves as legal proof for a discussion and contains detailed notes, it might require spending extra time wordsmithing and getting feedback from colleagues.

Follow Up Regularly to Ensure Things Get Done

After sharing the meeting summary, it is not over. As mentioned earlier, the point of a meeting is not to have a meeting; it is to progress toward your bigger goals, like integrating an acquisition, introducing a new product, or winning customers.

Therefore, you are ultimately measured on whether you are moving the needle forward. The project or initiative owner must ensure that the key activities working toward the bigger goal get completed. After sharing the actions that come out of a meeting, you will likely need to continue following up and reminding the action owners of their to-dos. Often it is best to schedule another session for people to share their work or discuss additional topics.

Following-up regularly is an integral part of successful project management and leadership. Without reminding people, actions might not get executed unless your company has a culture of incredible ownership.

Conclusion

We just covered seven habits to improve your meetings and make you a better facilitator. Some tactics might have been familiar to you, while others may have been new and will be harder to apply. Even though I firmly believe all of the discussed tactics will make your meetings more effective, I encourage you to use whatever works for you and discard what doesn't.

To recap, we learned seven habits:

1. **Clarify the purpose:** Every meeting needs to have clear and specific objectives. Identify whether you want to inform, discuss, or decide something.
2. **Create an agenda:** A meeting agenda that lists the key objectives is the most crucial document for successful meeting preparation.
3. **Share the logistics:** When preparing a meeting, always suggest a time, send a detailed invite to all

attendees, and share relevant pre-read materials well in advance.

4. **Start and end on time:** The start and end of your meetings are crucial. Begin by providing context and the agenda, and finish by recapping decisions and next steps.
5. **Facilitate the discussion:** Ensure a focused and engaging discussion on the key topics and provide psychological safety to encourage everybody to contribute.
6. **Note decisions and action items:** Take notes during the meeting, listing the critical decisions and action items.
7. **Follow up:** Share a meeting summary with all attendees soon after the meeting and regularly follow up with action owners to ensure completion.

Becoming an effective leader and contributor is an ongoing journey, and there will always be areas to improve your meeting facilitation and communication skills. Covering every possible situation is beyond the scope of this book.

This book serves as one resource that will help you on your journey. Still, the most effective facilitators are always looking for ways to improve by leveraging various sources, from books to colleagues.

Thanks for reading, and good luck on your journey.

Best,
Felix

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About the Author

Felix Haller is a lifelong learner, optimist, and business enthusiast.

He worked as a management consultant at the global management consulting firm Bain & Company for almost six years. As a manager, he led and coached project teams in various industries and capabilities, including strategy, mergers and acquisitions, and performance improvement.

Over the last decade, he has lived, worked, and studied in China, Germany, the Netherlands, and the US. He holds degrees from the Rotterdam School of Management (The Netherlands), Fudan University (China), and the Ludwig-Maximilian University (Germany).

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