

**HOW TO  
RUN**

# **SUPER MEETINGS**



**SPECIAL  
EDITION**

**BROUGHT TO YOU BY  
WELLPATH L&OD**

**YOUR GUIDE TO  
\*SUCCESSFUL\*  
MEETINGS**





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**WOW!**



## **WHY MEETINGS?**

We've all endured unproductive meetings—ones where our objectives aren't met, key players don't show up, or attendees arrive unprepared. We've heard one person dominate the conversation. We've seen participants leave with no new information or guidance. And we've all been in meetings that could have easily been an email instead!

But meetings don't have to be a waste of time. Through deliberate planning and execution, you can facilitate meetings that stay on track, encourage equal participation, and drive projects forward.

### **A Meeting's Purpose**

Why do we hold meetings? Meetings facilitate communication and collaboration with others. Through meetings, we:

- Deliver instructions
- Reach agreements
- Exchange knowledge or information
- Solve problems
- Assign tasks
- Brainstorm idea
- Formulate plans

***IN SHORT, WE HOLD  
MEETINGS FOR COUNTLESS  
REASONS, BUT THERE'S  
ONE THING THEY ALL HAVE  
IN COMMON:  
MEETINGS ARE  
GOAL-ORIENTED  
EVENTS.***

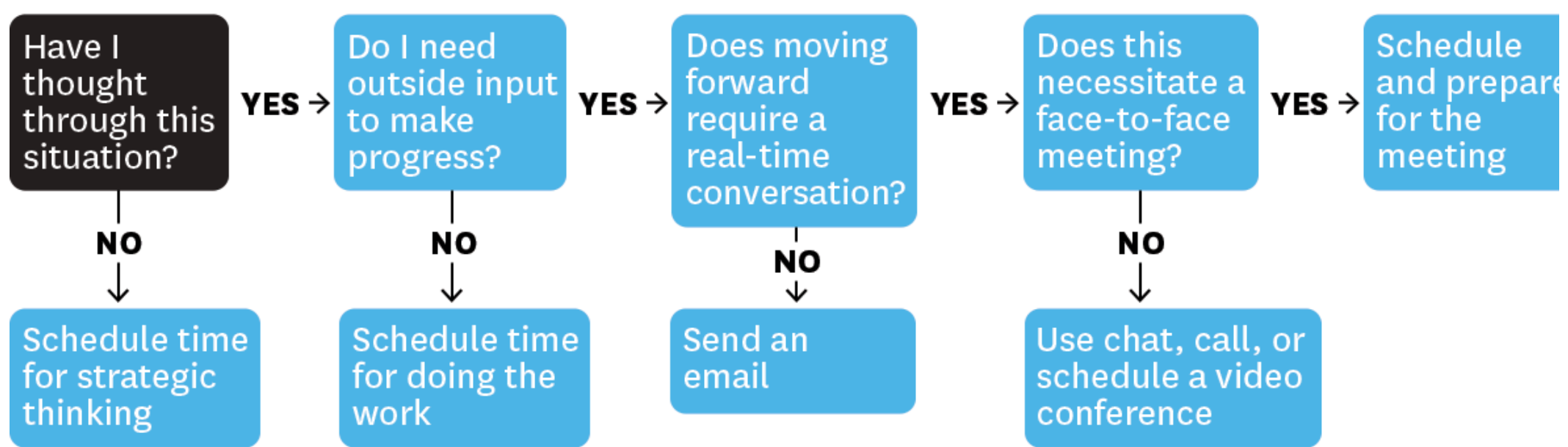


# MEETING DECISION TREE

## Should We Have a Meeting?

The first step to running an effective meeting is to ask yourself: "Is a meeting the best way to achieve my goal?" Or, "Is there another medium of communication or collaboration that would produce the same results?"

Follow the flowchart below to assess the potential need (if viewing digitally, you may also click on the image for an interactive version of the decision tree):



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If you determine that a meeting may be the best way to move forward, you need to understand your responsibilities as the meeting organizer and/or facilitator.

**"MEETINGS MUST BE  
DELIBERATE AND INTENTIONAL .**

**AN ORGANIZATION'S RHYTHM SHOULD  
VALUE PURPOSE OVER HABIT, AND  
EFFECTIVENESS OVER EFFICIENCY."**

**2**

## ***FIVE STEPS FOR EFFECTIVE MEETINGS***

Running a meeting may sound simple: You just call together some people and then ... talk. Right? While there's a time and place for impromptu meetings, a little bit of legwork can significantly improve your meetings' efficiency and focus.

**The five foundational steps for running effective meetings are:**

***DEFINING YOUR  
OBJECTIVE***

***INVITATION  
MANAGEMENT***

***AGENDA  
SETTING***

***FACILITATION***

***SUMMARY***

**Read on for an overview of these five steps, with more information in other, following sections!**



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***YOUR MEETINGS  
ARE GOING  
TO ROCK!***



## **DEFINING YOUR OBJECTIVE HI-LITES**

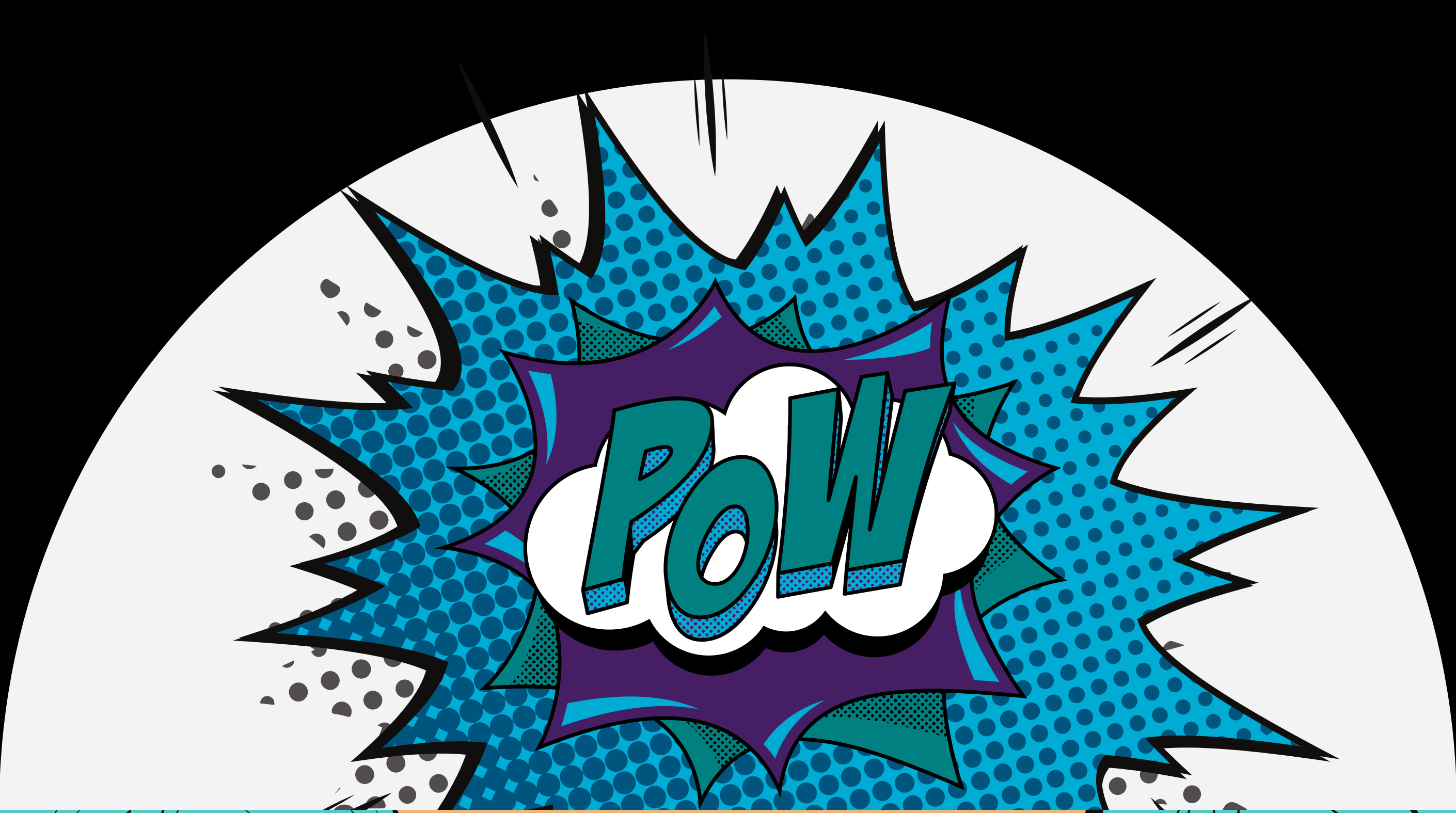
You decide to call a meeting for a reason. You need to discuss a particular issue, idea, or project. You have something you hope to achieve. Whatever the “why” might be, if you’re going to run an effective meeting, you need to ask yourself, “What do we want and need to accomplish by the end of this meeting?”

**Here is a list of common reasons why you might want to call a meeting:**

- Share knowledge or provide training
- Brainstorm and develop new ideas
- Align team members
- Solve problems
- Solicit feedback
- Give direction
- Make decisions
- Boost morale or foster team-building

If you don’t see your specific reason on this list, that doesn’t mean you shouldn’t hold your meeting. The key is to understand the purpose of your meeting before you plan it.





# 3

## AGENDAS - A DEEPER DIVE

Setting an agenda for your meetings offers many benefits, including:

- Clarity. An agenda clearly details what topics a meeting will cover and in what order. It also defines your meeting objectives.
- Focus. An agenda keeps attendees focused by providing structure for the meeting. Discussion is less likely to take a detour when there is a clear road map.
- Alignment. Finally, an agenda helps to get alignment and ensures that attendees arrive at the meeting with the right expectations. It gives participants a framework for discussion and the opportunity to prepare relevant thoughts for contribution.

### START WITH LOGISTICS

Start with basic details of the meeting that answer questions about who, where, and when. This includes: the date, time, and location of the meeting, meeting duration/facilitator/attendees, any materials attendees should bring to the meeting

Tip: Try to limit the number of meeting attendees you invite. You should only invite those people who are needed to accomplish your meeting objectives or who are affected by the project.

### STATE THE OBJECTIVES

Your objective is the result or outcome you hope to achieve by the end of this meeting.

Don't confuse a meeting topic with the meeting's objective. The objective is your meeting's purpose, and it determines how a meeting is defined as a success.

### REVIEW HOUSEKEEPING

Housekeeping items describe any introductory items that need to be covered or reviewed before getting into the main talking points of the meeting. These items might include a summary of results from a previous meeting, introductions, project overviews, or even ground rules for the meeting's discussion.

REMEMBER: YOU CAN USE THE  BUTTON TO ENLARGE PAGES



## GROUP FACILITATION TECHNIQUES

**"THE FACILITATOR'S JOB IS TO SUPPORT EVERYONE TO DO THEIR BEST THINKING. TO DO THIS, THE FACILITATOR ENCOURAGES FULL PARTICIPATION, PROMOTES MUTUAL UNDERSTANDING, AND CULTIVATES SHARED RESPONSIBILITY."**

Sam Kaner  
Organizational Development Consultant



**WOW!**

Meeting facilitators are not expected to have all of the answers to questions on the meeting's agenda, nor all of the solutions to issues that the meeting will uncover. Rather, a facilitator is expected to help the group, using their leadership and interpersonal skills, reach those answers or solutions collectively. For example, facilitators:

- Engage participants. Encourage equal and active participation in meetings. Provide discussion prompts and make sure that everyone's voice is heard.
- Create a productive environment. Establish an environment of trust and respect in which participants feel safe, inspired, and open to share. Help the group navigate disagreements constructively.
- Achieve meeting objectives. Keep the discussion relevant to the meeting's objectives and summarize key action items or takeaways.

# 4

## CONSENSUS BUILDING

A common goal of meetings is to reach agreement on an idea, issue, or decision. For example, you might need to converge multiple ideas into a single strategy, decide on the best course of action, or develop a common vision.

**Building consensus describes this process of reaching agreement in a group setting.**

Reaching consensus is not always a linear process. It can be messy, and you might need to repeat steps several times before you find the right solution. To help speed up this process, consider the following five steps for building consensus:



**DEFINE THE ISSUE**

**GATHER INITIAL REACTIONS**

**BRAINSTORM AND DEBATE IDEAS**

**FORM A PROPOSAL**

**TEST FOR AGREEMENT AND ITERATE**

### TEMPERATURE CHECK

One strategy to test for consensus is to check the group's temperature. Present a proposal and then ask meeting participants to share how they feel about it on a scale of 1-5:

- "1" means that the participant fundamentally objects to the proposal and prefers to create a new one.
- "2" means that the participant has some reservations.
- "3" means that the participant neither approves or disapproves of the proposal.
- "4" means that the participant likes the proposal but would like to make a few amendments.
- "5" means that the participant fully approves of the proposal as is.



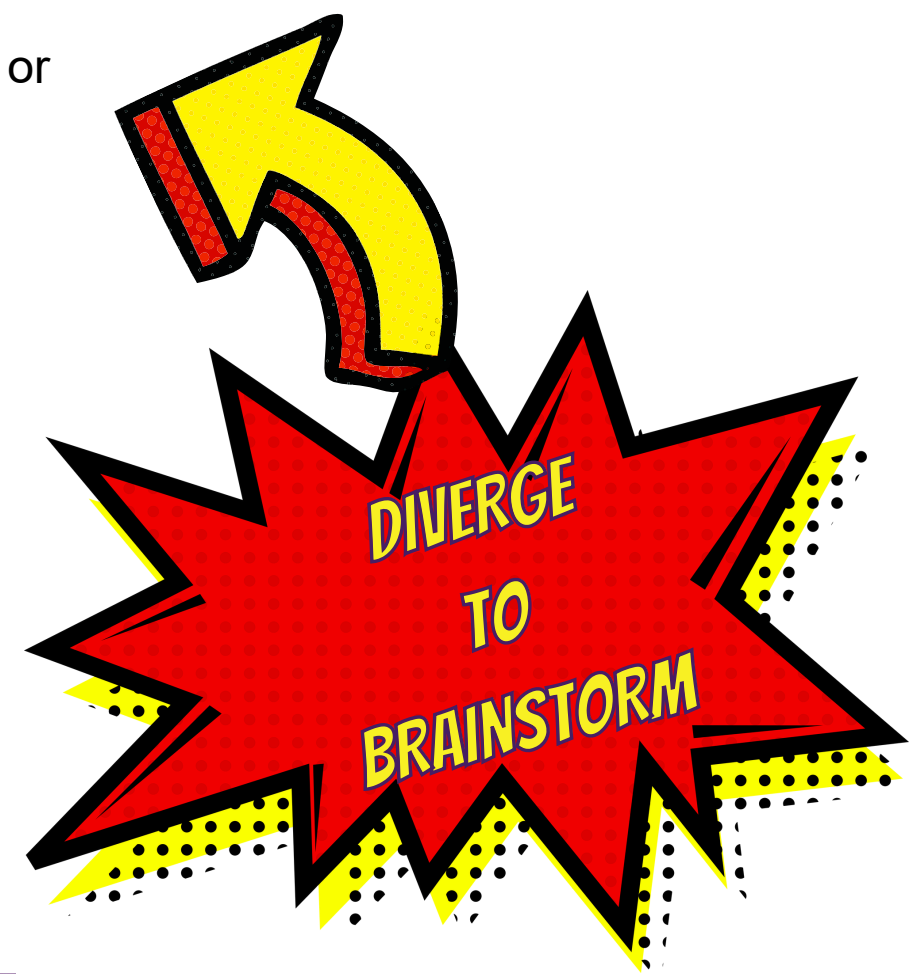
Use this temperature check to quickly assess your group's level of consensus and guide the discussion that follows. Depending on the responses you receive, you might need to address reservations, brainstorm amendments, or throw out the proposal and draft something new.

# 4

## CONSENSUS BUILDING

Before we try to converge on a solution, plan, or set of priorities, we need to allow sufficient time and space to diverge. This can be accomplished through brainstorming. The goal of brainstorming is to get ideas and options up for consideration. At this point, all ideas are equal - no need to judge, prioritize, or analyze them.

The team task is to generate as many ideas as possible. This is time to let the team take the lead! No idea is too crazy, no ramble, half-formed thought disallowed. Allow ample time for this exercise in order to foster engagement across the entire team.



As the facilitator, though, at some point you will need to focus the group towards convergent thinking. Lead the team in narrowing the ideas list down, in ranking, combining, or even eliminating ideas in order to converge on a single decision or at least a very small subset of options to decide upon later.

The balance between divergent and convergent thinking is a foundation of good facilitation. Cultivating a whole team view is crucial to reaching consensus.

## MANAGING CONFLICT

### Practice a Structured Dialogue Exercise

Pair two people up and assign one person the role of listener and the other the role of speaker. Have the speaker share their thoughts or concerns, uninterrupted.

**Next, ask the listener to take the following three steps:**

- First, ask the listener to repeat what the speaker said verbatim.
- Second, ask the listener to summarize what the speaker said in the listener's own words.
- Finally, have the listener address all of the speaker's concerns or viewpoints sequentially.



# 5

## MEETING RESOURCES: ICEBREAKERS AND ACTIVITIES IDEAS

### QUESTION OF THE DAY

Choose one question and let everyone answer it. For example:

- What is your favorite hobby, and how did you get into it?
- If you could have any superpower, what would it be, and why?
- What skill have you always wanted to learn but have not had the chance to?



### MENTAL HEALTH CHECK-IN

Allow people to say one word about their stress level for the day gives them a chance to “get it out” without derailing the meeting.

You can use a scale of emojis or funny memes (work appropriate, please) and ask them to select one as well.

### TIE THE INTRODUCTIONS TO YOUR TOPIC

Start the meeting with an activity related to the purpose of the meeting. This gives people a chance to get to know each other better and still have do something related to the topic at hand.

- For example, if you are working on team goals, have each person share their hobby and how they measure success with their hobby.

### MORE IDEAS ONLINE

Click on the links or search Google for these terms

[Team Meeting Icebreakers](#)

[In-Person Team Meeting Activities](#)

[Remote Team Meeting Activities](#)

**BE  
A MEETING  
HERO!**



**MEETING DO'S**

# 6

## MEETING DO'S LIST

### ***MAINTAIN A MOTIVATING TONE.***

What that motivating tone may be depends on the type of team, the individual team members, and the circumstances. But it should always be top of mind, because without the right emotions, people can't perform at their best.



### ***HOLDING TEAM MEMBERS ACCOUNTABLE.***

This doesn't mean coming down on someone in a meeting, which can do more harm for performance than good, due to the emotional impact. It means asking about progress, letting them know they have the responsibility, and will get the rewards.

### ***OFFERING RECOGNITION.***

Acknowledging accomplishments and team members' hard work is a great morale booster!



### ***ASKING THE RIGHT QUESTIONS.***

If a team is not asking the right questions, then no matter how well they answer the wrong questions, the business problem remains.



### ***SPENDING TIME SOLVING PROBLEMS.***

It's tempting to fill the agenda with a long list of things to talk about, but allocating more time to discuss solutions to important issues is often much more productive.

### ***KEEPING THINGS RELEVANT.***

No one wants to sit in a meeting that doesn't require their input, so stick to meeting items that affect everyone present.



**DON'T BE  
A MEETING VILLAIN!**



**MEETING  
DON'TS**



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To hope and healing.

# YOU MAKE MEETINGS SUPER!

